

Research Report on Automobile Air Bag Industry in China, 2018-2022

<https://marketpublishers.com/r/R0CBDC36C37EN.html>

Date: November 2017

Pages: 50

Price: US\$ 2,400.00 (Single User License)

ID: R0CBDC36C37EN

Abstracts

Description

An air bag system is a kind of protection system providing passive safety. It provides passengers with effective protection against collision along with the use of seat belts. Automobile air bags can reduce the probability of head injuries by 25% and that of face injuries by 80% in a car crash. There is a remarkable growth in the penetration rate of air bags with the launch of vehicle safety standards in different countries. In developed countries, this rate has approached close to 100%. The global output volume of automobiles has exceeded 90 million in 2017, representing an upward trend for years. As the global automobile industry develops, the air bag industry as well continues to grow.

Estimated by CRI, the global market value of air bags has reached over USD 10 billion in 2017. The global air bag industry is driven by the growth of the global output volume of automobiles. This industry is expected to prosper in the near future due to increases in the application volume of air bags.

According to CRI, barriers such as technology and sales channel contribute to a high concentration rate of the global air bag industry, mainly dominated by foreign-invested enterprises. In the global market, famous air bag manufacturers include AUTOLIV, TRW, TAKATA, TOYODA GOSEI and KSS, occupying more than 80% market shares in total. AUTOLIV is the world's biggest air bag manufacturer, further consolidating its position after requiring Delphi air bags.

Since the automobile industry can serve as a strong job provider and a pillar industry for national economy, the Chinese government has always attached great importance to

this industry and issued policies to promote its development. But standards concerning air bags yet remain at an experimental level in China due to legislations on air bags falling behind. China's legislations lack descriptions on whether to install air bags or not and relevant standards concerning air bags.

Market investigation by CRI shows that China's air bag industry is mainly dominated by multinational corporations such as AUTOLIV, TRW, TAKATA and TOYODA GOSEI. Market shares occupied by domestic air bag manufacturers represent less than 30% in 2017. AUTOLIV is an OEM partner of automobile enterprises like General Motors, Ford and Volkswagen. Similarly, TOYODA GOSEI is an OEM partner of Toyota, Changan Suzuki, etc. and TRW is an OEM partner of Volkswagen, General Motors, etc. A majority of clients of TAKATA are Japanese automobile enterprises, but TAKATA also supplies to Volkswagen and some domestic enterprises in China. In 2016, the export value of air bags in China was approximately USD 6.6 million, with a slightly higher import value of USD 7.78 million.

Since the Chinese government fail to issue compulsory regulations on air bag installation, the penetration rate of air bags in China was low in early years. In particular, manufacturers of a range of low-end modes that were sold at prices within CNY 100,000 (USD 15,000) did not install air bags on the purpose of cost saving. Automobile manufacturers continue to increase the installation rate of air bags to attract customers with the prevalence of automobiles in China and customers' increasing awareness of safety. CRI market research indicates that the installation rate of air bags has exceeded 70% in 2017, even for those automobiles that are sold at prices of approximately USD 10,000. In 2017, the market value of China's air bag industry has exceeded CNY 10 billion (USD 1.5 billion).

CRI estimates that China's automobile air bag industry will continue to grow during 2018 and 2022 owing to continuous growth of vehicle output volume as well as penetration rate of air bags. The vehicle output volume exceeded 28.12 million in China in 2016, representing a CAGR of 9.9% from 2012 to 2016, far higher than the global growth rate of vehicle output volume during the same period. During 2018 and 2022, the CAGR of vehicle output volume is expected to reach 5% in China. The proportion of air bags for OEM market and the average quantity of air bags in each vehicle are projected to grow with the growth of safety awareness of Chinese citizens and their demand for vehicle safety performance.

Readers can acquire the following information or more through this report:

Policy Environment of China Air Bag Industry

Production Status of Air Bags in China

Demand Status of Air Bags in China

Major Global Air Bag Manufacturers

Analysis of Air Bag Manufacturers and Their Clients

Competition Status of Air Bag Market

Barriers to Entry in China Air Bag Industry

Price Trend of Air Bag Raw Materials in China

Driving Forces and Market Opportunities of China Air Bag Industry, 2018-2022

Risks and Challenges Faced by China Air Bag Industry, 2018-2022

Forecast on Supply and Demand of Air Bags in China, 2018-2022

Contents

CHAPTER I RELEVANT CONCEPT OF AUTOMOBILE AIR BAG INDUSTRY

- 1.1 Definition of Automobile Air Bag
- 1.2 Classification of Automobile Air Bags
- 1.3 Research Methods of Report
 - 1.3.1 Parameters and Assumptions
 - 1.3.2 Data Sources
 - 1.3.3 About CRI
- 1.4 Development Status of Global Automobile Air Bag Industry, 2013-2017

CHAPTER II DEVELOPMENT ENVIRONMENT OF CHINA AUTOMOBILE AIR BAG INDUSTRY, 2013-2017

- 2.1 Economic Environment of China Automobile Air Bag Industry
 - 2.1.1 Global Economy
 - 2.1.2 Chinese Economy
 - 2.1.3 Development Status of Automobile Industry
- 2.2 Policy Environment of China Automobile Air Bag Industry
 - 2.2.1 Government Policies of China Automobile Industry
 - 2.2.2 Government Policies of China Automobile Air Bag Industry
 - 2.2.3 Industry Standards of Automobile Air Bags in China

CHAPTER III ANALYSIS ON CHINA AUTOMOBILE AIR BAG INDUSTRY, 2013-2017

- 3.1 Development Process of China Air Bag Industry
- 3.2 Analysis on Supply of Air Bags in China, 2013-2017
 - 3.2.1 Major Air Bag Manufacturers in China
 - 3.2.2 Output Volume of Air Bags in China
- 3.3 Analysis on Demand for Air Bags in China, 2013-2017
- 3.4 Analysis on Import and Export of Air Bags in China
 - 3.4.1 Import
 - 3.4.2 Export

CHAPTER IV ANALYSIS ON CHINA AUTOMOBILE AIR BAG INDUSTRY CHAIN

- 4.1 Constitution of Global Air Bag Industry Chain
- 4.2 Analysis on Upstream Air Bag Industry Chain in China

- 4.2.1 Nylon and Terylene
- 4.2.2 Air Bag Cloth
- 4.2.3 Price Trend of Air Bag Raw Materials
- 4.3 Demand of Whole-vehicle Manufacturers for Air Bags

CHAPTER V ANALYSIS ON COMPETITION OF CHINA AUTOMOBILE AIR BAG INDUSTRY, 2017

- 5.1 Barriers to Entry in Air Bag Industry
 - 5.1.1 Technological Barriers
 - 5.1.2 Capital Barriers
 - 5.1.3 Brand Barriers
- 5.2 Competition Structure of China Air Bag Industry
 - 5.2.1 Bargaining Power of Upstream Raw Material Suppliers
 - 5.2.2 Bargaining Power of Downstream Clients
 - 5.2.3 Competition inner the Air Bag Industry
 - 5.2.4 Potential Entrants of Air Bag Industry
 - 5.2.5 Substitutes of Air Bags

CHAPTER VI MAJOR AUTOMOBILE AIR BAG MANUFACTURERS IN THE GLOBE, 2017

- 6.1 AUTOLIV
- 6.2 Takata Corp.
- 6.3 TRW Automotive Holdings Corp.
- 6.4 TOYODA GOSEI Co., Ltd.
- 6.5 KSS
- 6.6 Hyundai MOBIS
- 6.7 Changzhou Changrui Automobile Parts Co., Ltd.
- 6.8 Jinzhou Jinheng Automobile Safety System Co., Ltd.
- 6.9 East Jiule Automobile Safety System Co., Ltd.
- 6.10 BYD Co., Ltd.
- 6.11 Ashimori Industry Co., Ltd.
- 6.11 Quanxing Machining Group
- 6.12 Taihang Changqing Automobile Safety System Co., Ltd.
- 6.13 Jiangsu Favor Automotive New Stuff Sci-Tech Co.,Ltd.
- 6.14 S&T Daewoo Automotive Co., Ltd.
- 6.15 Nihon Plast Co., Ltd.

CHAPTER VII PROSPECT OF CHINA AUTOMOBILE AIR BAG INDUSTRY, 2018-2022

7.1 Factors Influencing Development of China Air Bag Industry

7.1.1 Driving Forces and Market Opportunities

7.1.2 Risks and Challenges

7.2 Forecast on Supply of Automobile Air Bags in China, 2018-2022

7.3 Forecast on Demand for Automobile Air Bags in China, 2018-2022

7.4 Development Trend of China Automobile Air Bag Industry

Selected Charts

SELECTED CHARTS

Chart Global Market Size of Passive Safety Products by Product Type, 2015-2022

Chart Disposable Income Per Capita in China, 2013-2017

Chart Output Volume and Prediction of Automobiles in China, 2012-2022

Chart Relevant Policies in China Passive Safety Industry

Chart Relevant Experimental Standards of Air Bags in China

Chart Major Automobile Brands of Air Bag (Including Parts) Manufacturers and OEMs, 2017

Chart Output Volume of Air Bags in China, 2013-2017

Chart Market Size of Air Bags in China, 2013-2017

Chart Major Export Destinations of Air Bags in China, 2017

Chart Major Import Sources of Air Bags in China, 2017

Chart China Automobile Passive Safety Industry Chain

Chart Air Bag Industry Chain

Chart Major Air Bag Cloth Manufacturers in China, 2017

Chart Sales Revenue of AUTOLIV Air Bags, 2013-2017

Chart Forecast on Output Volume of Automobile Air Bags in China, 2018-2022

Chart Forecast on Market Size of Automobile Air Bags in China, 2018-2022

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