

Automotive Active Grille Shutter (AGS) Market by Vehicle Type (Passenger Car, LCV, and M&HCV), by Shutter Vanes Type (Horizontal AGS and Vertical AGS), by Shutter Type (Visible AGS and Non-Visible AGS), and by Region (North America, Europe, Asia-Pacific, and Rest of the World), Trend, Forecast, Competitive Analysis, and Growth Opportunity: 2018-2023

<https://marketpublishers.com/r/AFC2D317EC4EN.html>

Date: May 2018

Pages: 208

Price: US\$ 4,790.00 (Single User License)

ID: AFC2D317EC4EN

Abstracts

This report, from Stratview Research, studies the global automotive active grille shutter market over the trend period 2012 to 2017 and forecast period 2018 to 2023 both in terms of value and units. The report provides detailed insights into the market dynamics to enable informed business decision making and growth strategy formulation based on the opportunities present in the market.

The Global Automotive Active Grille Shutter (AGS) Market: Highlights

Active grille shutter is an advanced mechatronic component, which performs a key function of selectively allowing or restricting airflow with an automatic opening and closing of shutters based on real-time needs. This results in reducing aerodynamic drag to an extent and improving the fuel economy of the vehicle, thereby leading to reduced CO2 emissions. The automotive industry is very keen on adopting technologies, which lead to an improvement in fuel economy and a reduction in harmful emissions.

The automotive active grille shutter market is likely to grow at an impressive double-digit rate over the next five years to reach US\$ 1078.7 million in 2023. The auto industry has

efficaciously been ushering in a new era of aerodynamic vehicles with a meticulous investment into advanced components that can address the changing business requirements in the most effective manner. All the major automakers have vigorously been incorporating active components in their most-renowned vehicle models with the purpose to improve the overall fuel efficiency of vehicles in order to address stringent government regulations, such as CAFE Standards and EU Commission on Carbon Emissions Reduction Targets.

Active grille shutter is a key component of active aerodynamic family and has been catching the automakers' attention by offering a vast list of advantages. On an average, AGS offers signification weight reduction up to 20% and improvement in aerodynamic performance up to 30% as compared to non-AGS vehicle. Today, AGS has successfully found its presence in both premium vehicle models as well as mass-produced vehicle models of almost all major automakers including Ford, GM, Toyota, BMW, Lincoln, Honda, Mazda, Mercedes-Benz, and Rolls Royce.

The biggest factor driving the market for AGS is an incessant increase in its penetration in the automotive industry year on year as all the major automakers are incorporating this technology in their major vehicle models. One side, major automakers are working closely with the AGS suppliers in order to make their vehicle more fuel efficient, whereas another side, AGS suppliers are working hard to quickly meet automakers' rising demand for a well-engineered, high-quality AGS system that helps to address fuel economy standards.

AGS has a disruptive journey so far in the automotive industry and has evolved a lot with changing market needs and designs. However, to maintain the growth momentum, AGS must to adapt itself as per the new business environments including a greater incorporation of ADAS (Advanced Driver-Assistance Systems) electronics, such as auto-braking and auto cruise control; the development of new diesel and electric engines; and introduction of more stringent regulations regarding pedestrian protection and carbon emission reductions.

Development of innovative AGS solutions is an indispensable focus area of the AGS suppliers based on the requirements of auto OEMs. The market for AGS is marked by major global automotive tier players including Rochling Automotive, Magna International Inc., and Valeo SA. Also, it is expected that the excellent growth of active grill shutters may entice other players to enter the market to tap the growth potential.

The global automotive active grille shutter market is segmented based on the vehicle

type as Passenger Car, LCV (Light Commercial Vehicle) and M&HCV (Medium- and Heavy-Duty Commercial Vehicle). A passenger car is expected to remain the growth engine of the global automotive active grille shutter market during the forecast period of 2018 to 2023. Increasing production of passenger cars coupled with increasing penetration of AGS in passenger car models is likely to elevate the demand for AGS in the passenger car segment.

Based on the shutter vanes type, the automotive active grille shutter market is segmented as Horizontal Vanes and Vertical Vanes. Horizontal vane-based active grille shutter is expected to remain most dominant type in the global automotive active grille shutter market during the forecast period. Both horizontal, as well as vertical vane segments, are likely to witness healthy growth rates over the next five years.

Based on the regions, Europe is expected to remain the largest automotive active grille shutter market during the forecast period. Stricter emission norms of European Commission have led to a faster adoption of active grille shutter into European vehicles. Ford Focus & Fusion, BMW 5 Series & 7 Series, Renault Twingo & Talisman, Citroen C4 Picasso, and Audi Q7 are some key European models that have active grille shutters. Asia-Pacific is likely to depict the highest growth during the forecast period with China being the key source of growth.

The supply chain of this market comprises raw material suppliers, actuator suppliers, automotive active grille shutter manufacturers, automotive OEMs, and dealers, and end-users. the key raw material suppliers for automotive active grille shutter are Lanxess AG, Celanese Corporation, and BASF SE, whereas some of the major active grille shutter actuator suppliers are Hella KGaA Hueck & Co., Sonceboz SA, Johnson Electric, and Brose Fahrzeugteile GmbH & Co. KG.

The key automotive active grille shutter manufacturers are Rochling Automotive, Magna International Inc., Valeo SA, SRG Global, HBPO, and Shape Corporation. The development of integrated active grille shutters and forming strategic alliances with the automakers are the key strategies adopted by the major players to gain a competitive edge in the market.

Research Methodology

This report offers high-quality insights and is the outcome of detailed research methodology comprising extensive secondary research, rigorous primary interviews with industry stakeholders and validation and triangulation with Stratview Research's

internal database and statistical tools. More than 1,000 authenticated secondary sources, such as company annual reports, fact book, press release, journals, investor presentation, white papers, patents, and articles have been leveraged to gather the data. About 15 detailed primary interviews with the market players across the value chain in all four regions and industry experts have been executed to obtain both qualitative and quantitative insights.

Report Features

This report provides market intelligence in the most comprehensive way. The report structure has been kept such that it offers maximum business value. It provides critical insights into the market dynamics and will enable strategic decision making for the existing market players as well as those willing to enter the market. The following are the key features of the report:

Market structure: Overview, industry life cycle analysis, supply chain analysis

Market environment analysis: Growth drivers and constraints, Porter's five forces analysis, SWOT analysis

Market trend and forecast analysis

Market segment trend and forecast

Competitive landscape and dynamics: Market share, product portfolio, product launches, etc.

Attractive market segments and associated growth opportunities

Emerging trends

Strategic growth opportunities for the existing and new players

Key success factors

The global automotive active grille shutter market is segmented into the following categories.

Automotive Active Grille Shutter Market, By Vehicle Type

Passenger Car (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Light Commercial Vehicle (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Medium- & Heavy-Duty Commercial Vehicle (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Automotive Active Grille Shutter Market, By Shutter Vanes Type

Horizontal Vanes (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Vertical Vanes (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Automotive Active Grille Shutter Market, By Shutter Type

Visible AGS (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Non-Visible AGS (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Automotive Active Grille Shutter Market, By Region

North America (Country Analysis: The USA, Canada, and Mexico)
Europe (Country Analysis: Germany, The UK, Russia, and Rest of Europe)
Asia-Pacific (Country Analysis: China, Japan, Taiwan, Malaysia, and Rest of Asia-Pacific)
Rest of the World (Country Analysis: Brazil, Argentina, and Others)
Report Customization Options

With this detailed report, Stratview Research offers one of the following free customization options to our respectable clients:

Competitive Assessment

Competitive Benchmarking of key players (up to 3 players)
SWOT analysis of key players (up to 3 players)
Regional Segmentation

Current market size (2017) of the active grille shutter market in any of the European country by vehicle type

Custom Research: Stratview Research offers custom research services across sectors. In case of any custom research requirement related to market assessment, competitive benchmarking, sourcing and procurement, target screening, and others, please send your inquiry at sales@stratviewresearch.com.

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