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VEHICLE SECURITY & ACCESSORIES

Supplier capability in China

EXECUTIVE SUMMARY

China suppliers of vehicle security and accessories are looking forward to a rebound in exports as the economic recovery of major markets becomes more solid. Many are taking the coming months as a chance to boost key competencies in preparation for greater uptake.

This optimistic projection follows months of exports plunging at double-digit levels. Between January and August 2009, customs statistics show total shipments of vehicle alarms and door locking systems, audio and visual signaling equipment, seats and exterior accessories such as bumpers, fenders, bonnets and kits plummeting 37 percent year on year. Revenue sank at a nearly similar rate to \$1.5 billion.

In the next 12 months, suppliers will continue to solidify their foothold in the EU and North America, which currently account for more than half of export revenue. A number of businesses will also explore market opportunities in the emerging economies of the Asia-Pacific region, Eastern Europe, South and Central America, Africa and the Middle East.

The following are some of the key trends we see as suppliers nurture growing demand in these areas:

- Many companies will keep prices stable in the months ahead. For several enterprises, quotes have not changed since the end of 2008, when they implemented reductions of about 5 percent to stimulate demand.

- With the cost of plastic and other manufacturing inputs again on the rise, most suppliers are shifting their sales mix toward higher-value lines to minimize the effect of additional expenses on price and profitability.

- In line with the move upmarket, more attention and resources will be allocated for R&D. Besides exploring new materials, finishes and technologies, several suppliers will actively engage in market research.

- Upcoming releases will highlight

converging technologies, particularly in the electronics segment. As part of efforts to differentiate and raise product value, multiple functions will be integrated in designs.

- Releases will remain primarily designed for the aftermarket. With the industry's continued focus on the sector, ease of installation and operability will also be a major consideration in R&D.

This report covers the major lines of China's vehicle security and accessories industry, namely electronic security and safety systems, interior and exterior add-ons, and garage and tire repair equipment.

The categories are discussed in separate sections. For each line, details about the different types offered, their typical features and price determinants are provided.

The latest trends in design and materials are discussed as well. Information on the supplier base and key sourcing centers can also be found.

The Industry Overview illustrates the effects of the global economic downturn on exports. It also identifies the common strategies makers are employing to strengthen their position in the upscale aftermarket segment.

To reflect the industry structure, over three-fourths of the suppliers featured in this report are local, privately owned enterprises. The rest consists of Hong Kong- and foreign-invested businesses.

Half of the companies are based in Guangdong, which tops the list of exporting provinces. The area is particularly strong in security and safety systems, accounting for more than 50 and 25 percent of China's revenue from overseas shipments.

Zhejiang's local industry is also highlighted. The province is among the top five exporters of alarms and locks, signaling equipment, seats and exterior accessories.

In this report

- 18 in-depth company profiles
- 83 top-selling export products
- Supplier demographics
- Supplier survey
- Industry statistics & charts

METHODOLOGY

To produce this report, Global Sources surveyed a wide range of suppliers. Rather than focus simply on high-profile makers, we compiled a representative sample of large, midsize and emerging manufacturers. All profiled companies are export-oriented professional suppliers that may or may not be clients of Global Sources.

The selection of suppliers is designed to reflect the composition of the industry in China in terms of geographic spread, business type and company ownership.

For in-depth company profiles, our research teams interviewed senior executives and export managers who discussed their recent performance and provided, R&D, production and export forecasts for the next 12 months. The interviews were done in person, by phone or e-mail.

In each case, companies were required to answer specific questions designed to verify their manufacturing and export credentials, including their production and export statistics, and a breakdown of exports by product type and market. Our production checklist details the product-specific manufacturing capability of each supplier.

All profiled suppliers participated in a survey designed to provide insight into product and price trends, and challenges facing the industry. All survey questions are single choice. Results were calculated based on the actual number of valid responses to each question.

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Published by Publishers Representatives Limited (on behalf of Trade Media Limited)
4th Floor, Century Yard, Cricket Square, Elgin Avenue, P.O. Box 32322 SMB, George Town, Grand Cayman, Cayman Islands
c/o 22/F Vita Tower, 29 Wong Chuk Hang Road, Aberdeen, Hong Kong

ISBN 978-988-18625-0-1

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INDUSTRY OVERVIEW

China's vehicle security and accessories industry is preparing for greater uptake once global economic recovery becomes more stable. After being hit hard by the financial crisis, suppliers are taking the next few months as an opportunity to enhance competencies that will enable them to achieve sustained profitability and growth.

In the earlier months of 2009, most companies saw exports plunge at double-digit rates. Shipments to North America and the EU, in particular, declined 20 to 40 percent.

Customs statistics for the first eight months of the year show total shipments of car alarms, locking systems, navigation aids, parking sensors, seats, bumpers and other key categories down 37 percent year on year. Revenue also slid over 35 percent to \$1.5 billion.

Vehicle seats experienced the largest drop, with shipments reduced to 1.2 million pieces, a third of what they were during the same period in 2008. Despite a 33 percent increase in per-unit value, sales fell 55 percent to \$40 million.

For providers of exterior add-ons such as body kits, bumpers and fenders, export volume plummeted nearly 50 percent to 114.3 million kilograms. Revenue slid 36 percent to \$725 million, aided by the 25 percent surge in average unit value.

Certain vehicle security and safety accessories, which have higher technological content and value, fared relatively better. Shipments of car alarms, for instance, declined only 17 percent to 3.8 million units. With the 24 percent increase in average price, aggregate sales actually went up 3 percent to \$71.2 million.

Exports of safety accessories such as GPS devices and parking sensors remained on a growth track, albeit at slower rate. The number of products sent overseas reached 71.5 million units, an increase of only 2 percent,

which is 25 percentage points lower compared with the same period in 2008. Revenue fell nearly 40 percent to about \$600 million, as per-unit value slid 40 percent.

For 2010, the industry's outlook is positive, with most suppliers expecting global trade to expand once again. Many companies are anticipating rebounds in North America and EU orders, which together account for 50 to 60 percent of export revenue.

A number of enterprises are also predicting stronger demand from Eastern Europe, the Asia-Pacific region, the Middle East, South and Central America, and Africa. In fact, among the manufacturers featured in this report, 50 percent will be focusing on these areas.

Upmarket shift gains strength

Aiming for greater competitiveness, suppliers are shifting their sales mix toward higher-value lines to reduce their vulnerability to fluctuation in cost drivers. In doing so, companies hope to ease pressure on margins, allowing them to maintain current prices even if production expenses continue to rise.

For many businesses, quotes have remained unchanged since the end of 2008, when these were cut by about 5 percent to stimulate market interest. They are reluctant to raise prices for fear that this may dampen emerging demand. By having midrange and high-end designs account for a greater part of revenue, makers can maintain overall profitability, since margin losses in some lines may be offset by gains in others.

Large manufacturers have been particularly aggressive in pursuing the midrange and high-end segments. In the electronic security line, such enterprises are launching one series or five new products each year to catch up with foreign rivals. The designs are usually patented.

Similar efforts are seen among the sector's midsize enterprises, although

Supplier summary

Suppliers surveyed	18
Export sales	\$88.4mn
Export ratio	78%
OEM business	50%
Capacity utilized	69%
Annual R&D spending	\$12.2mn
Full-time employees	5,753

Data: All surveyed suppliers

their product development cycles tend to be longer. Even small makers are joining the bandwagon, with several working to replicate the simpler features of high-end releases.

In line with the upmarket shift, makers are paying more attention to R&D. Besides exploring new materials, finishes and technologies, they are actively looking into the specific needs of clients across different locations. As a result, many can now provide units that are on a par with those from the US, South Korea and other hubs abroad.

Some enterprises are turning to universities and research institutes for technological support. Tie-ups with component providers are also popular.

Additionally, among suppliers of tire and wheel changing equipment, a number are working with local automotive repair and maintenance stations for on-site testing of new products. Monitoring how units fare under actual workshop conditions makes it easier for suppliers to spot performance glitches. Further, these collaborations provide companies access to a shop's extensive record of tire parameters.

All-in-one solutions

R&D work for the upscale segment is geared toward providing cost-efficient models. Suppliers are tapping various technologies to create systems capable of performing multiple functions.

This convergence is especially apparent in electronic security and safety devices. The latest releases come with detection, monitoring and

Eternal Star Intl Industry Co. Ltd

Established in 2005, Eternal Star generated \$5.8 million from sales of vehicle accessories last year. The company's selection includes car safety devices, exterior and interior accessories, and repair equipment.

Revenue came primarily from exports to North America, the EU and the Middle East. Non-EU countries, the Asia-Pacific region, Africa, and Central and South America were also key markets.

OEM orders made up 80 percent of overseas shipments. The balance consisted of products under ODM

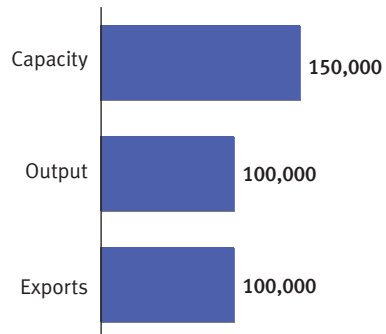
agreements and those bearing the in-house ES brand.

Eternal Star allocates about \$20,000 for R&D each year. It has a five-member product development team.

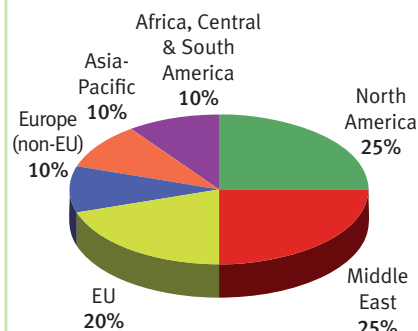
Manufacturing of vehicle accessories is carried out in three factories. Occupying a total area of 4,500sqm in Ningbo, Zhejiang province, the plants are equipped with mold-making facilities and machines for plastic injection, punching, cutting, sewing, surface treatment and assembly. Six personnel are in charge of QC.

Profile

Production units/mth



Export markets



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Company facts

Year established	2005
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Ningbo (Zhejiang)
Number of factories	3
Factory location(s)	Ningbo (Zhejiang)
Total factory area	4,500sqm
No. of full-time employees	115
No. of R&D/design staff	5
No. of QC staff	6
Annual sales (all products)	\$7.0mn
Annual R&D spending	\$20,000
ISO certification	Pending

Sales & output: Vehicle security & accessories

Annual sales	\$5.8mn
Share of total sales	83%
Annual export sales	\$5.8mn
Total monthly capacity	150,000 units
Average monthly output	100,000 units
Capacity utilized	67%
Average monthly exports	100,000 units
Export ratio	100%
OEM % of exports	80%
ODM % of exports	15%
OBM % of exports	5%
Other products made	Solar bags, TV stands, electric cars and scooters

Capability

Production checklist

Makes molds in-house	Yes
In-house PCB making	No
SMT machines	—
CNC machines	8
Plastic-injection machines	10
Punching, casting & stamping machines	20
Cutting machines	2
Sewing machines	30
In-house surface treatment	Yes
Assembly lines	2

Exports by product

Vehicle security	—
Vehicle safety	5%
Car exterior accessories	20%
Car interior accessories	30%
Garage & tire repair equipment	45%

Exports by market

North America	25%
European Union	20%
Europe (non-EU)	10%
Asia-Pacific	10%
Middle East	25%
Africa, Central & South America	10%

Survey

- **Export prices**
Increased
- **Export price increase**
Less than 5%
- **Export sales**
Stay the same
- **Target markets**
Africa, Central & South America
- **Capital expenditure**
Increase up to 50%
- **Major challenge**
Design copying/piracy
- **Export capability**
Improve operating efficiency
- **R&D focus**
Value-added features/functions

Popular export models



Garage & tire repair equipment

Model	ER6004
MOQ	1,000 sets
Packaging	Color card or buyer-specified
Delivery	25 days
Price	•

Description: Fire safety kit; EN 471-compliant safety vest, FFP2 mask, UL- and CE-compliant fire blanket, reflective triangle with E-Mark and 40-piece FDA-compliant first-aid set; in fire-resistant bag made of FMVSS 302-compliant fabric



Car interior accessory

Model	SC7002
MOQ	2,000 sets
Packaging	PP bag, carton
Delivery	30 days
Price	•

Description: Seat cover; PU exterior; 2mm-thick sponge padding; fire-resistant and/or environment-friendly material available; color specifications accepted



Garage & tire repair equipment

Model	ER6003
MOQ	2,000 sets
Packaging	Color card or buyer-specified
Delivery	20 days
Price	•

Description: Car emergency kit; safety vest, blanket, screwdriver, jumper cable, flashlight, electrical tape, gloves, luggage cord, towing rope, cable ties and FDA-compliant first-aid set; in carry bag; CE

• Information not disclosed

PRODUCT GALLERY

Vehicle security



Fuzhou Minpn
(profile page 36)
Model: MP-816
MOQ: 100 sets
Packaging: Color box
Delivery: 7 days
Price: \$39.30

Description: Alarm and passive keyless entry system; auto disarming and rearming; remote-controlled trunk release; memory automatically restores data after power interruption; CCC



LFF
(profile page 42)
Model: IM101
MOQ: 200 sets
Packaging: Color box
Delivery: 15 days
Price: •

Description: Immobilizer; 2.4GHz operating frequency; ASK or FSK modulation; built-in sensor in accelerometer with 3 to 5m transmission range; automatic engine shut off 30 seconds after driver leaves; resume via alarm function; 12±3V



LFF
(profile page 42)
Model: V2
MOQ: 200 sets
Packaging: Color box
Delivery: 15 days
Price: •

Description: Two-way car alarm; 433.92MHz operating frequency; ASK or FSK modulation; external vibration or microwave sensor; 1,000 to 1,500m effective range; code hopping; anti-scan technology; remote control with LCD screen and rechargeable lithium battery; 12±3VDC



LFF
(profile page 42)
Model: MA2
MOQ: 200 sets
Packaging: Color box
Delivery: 15 days
Price: •

Description: One-way car alarm; 433.92MHz operating frequency; ASK or FSK modulation; external vibration or microwave sensor; 80 to 100m effective range; auto arming/disarming, car locator; valet mode; 12±3VDC



LFF
(profile page 42)
Model: LC619C
MOQ: 100 sets
Packaging: Color box
Delivery: 15 days
Price: •

Description: Two-way GSM car alarm; 800/900/1800/1900MHz operating frequency; 80 to 100m effective range; ASK or FSK modulation; external vibration or microwave sensor; doubles as mobile phone with built-in SIM card slot; automatically dials listed emergency phone number on alarm



LFF
(profile page 42)
Model: F10
MOQ: 200 sets
Packaging: Color box
Delivery: 15 days
Price: •

Description: Two-way car alarm; 433.92MHz operating frequency; 1,000 to 1,500m effective range; ASK or FSK modulation; external vibration or microwave sensor; anti-theft mode enabled via pager; protection mode can be enabled even when engine is running

• Information not disclosed

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