

## **Global Idling Stop (Stop-Start) System Market: Key Research Findings 2011**

### ◆ **Research Outline**

**Yano Research Institute has conducted a study on global idling stop (or stop-start) system market with the following conditions:**

1. Research period: From June to August, 2011
2. Research targets: Auto manufacturers, vehicle system manufacturer, and etc.
3. Research methodologies: Face-to-face interviews, telephone and mail-in surveys in combination with literature research

What is Idling stop (or stop-start) system market?

Idling Stop (or stop start) is a technology that automatically stops the engine when the vehicle stops and automatically starts the engine when the vehicle starts moving again. This research covers five major system sectors in the idling stop system market (e.g. engine restart, battery state detecting, power management, transmission hydraulic control, and engine control system), targeting all passenger automobiles and commercial vehicles that weigh 3.5 ton or less excluding buses and trucks.

Note that so called strong and mild hybrid cars are not included in the target because they use driving power of motors to start the vehicle. On the other hand, those included in the target are: automobiles equipped with idling stop system without motors to run the vehicle; and micro hybrid cars that also have the system together with regenerative braking.

### ◆ **Key Findings**

- **With worldwide sales of vehicles using idling stop (or stop-start) system marked 2.21 million in 2010, the market of the system is expected to reach at a level of 23.08 million by 2017 by which North America and China are to participate in it**

Global sales of vehicle equipped with idling stop (or stop-start) system recorded 2.21 million in 2010. Although 99% of the whole market is currently occupied by Western Europe and Japan, the market has a latent power because compliance of environmental regulation and improvement of merchantability will likely to require automobiles to install idling-stop system even in North America and China, the countries of which with great potential but showing little interest at this moment yet. Global sales of number of vehicles equipped with the technology estimated to be 23.08 million by 2017, 10.5 times as larger than that of 2010.

- **The technology is still in the course of evolution to bring about further improvement of fuel efficiency**

Markets in Western Europe and Japan, the driving forces of idling stop (stop-start) system, are addressing technology enhancement for further improvement of fuel efficiency. Enhanced

idling stop system for cutting the engine while the vehicle slows down, and high-power regenerative braking system equipped with sub storage, are those expected for advancement.

◆ **Report format:**

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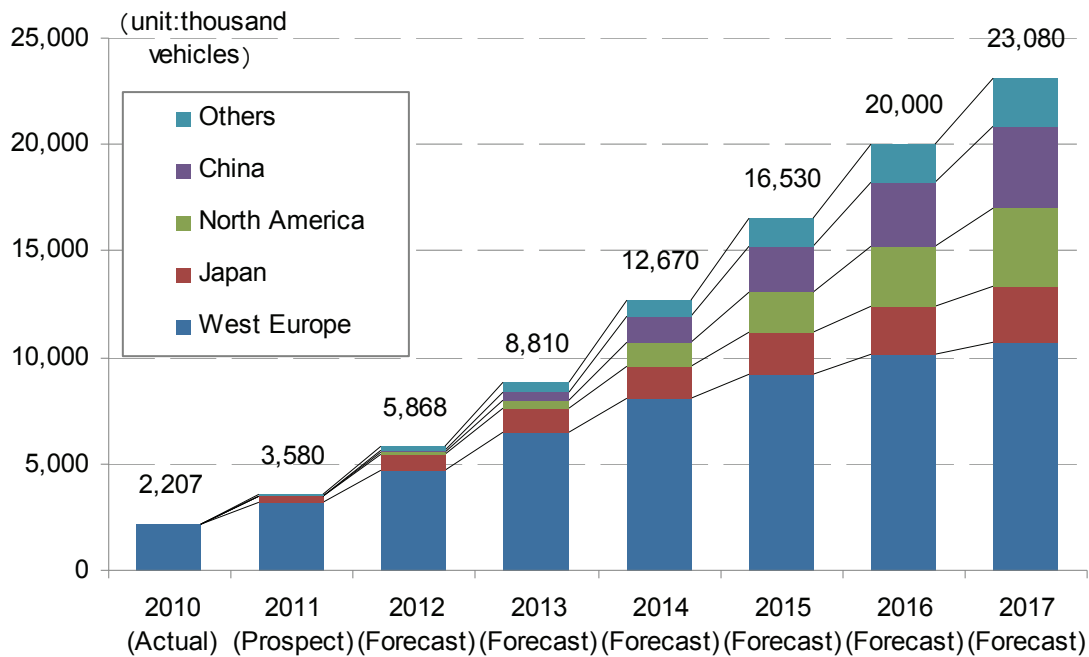
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**Figure1. Global sales forecast of number of vehicles equipped with idling stop system by region**



**Table1. List of major system sectors and the type/components of idling stop system**

System sectors	Type of each systems	Major component
Engine restart system	Starter type	Highly-durable starter
	Direct injection combustion and starter support type	Highly-durable starter (without direct injection combustion system)
	Belt-driven starter and alternator type	Starter and alternator / Belt and belt tensioner ECU (inverter)
	Starter for enhanced ISS	Starter for enhanced ISS *including improved parts to engines
Battery state detecting system (Battery sensor)		Current sensor
		Intelligent Battery Sensor
Power management system	DC-DC converter	DC-DC converter
	Lead-battery sub-power source system	Lead battery sub-power source system (small)
	Lithium-ion battery sub-power source system	Lithium-ion battery module/air conditioning system (fans)/current and temperature sensors/controller for cell monitoring, and etc./power relay(/voltage converter) and etc.
	Capacitor-sub-power source system	Capacitor module/voltage converter/ controller for cell monitoring, and etc.
Transmission hydraulic control system	Electric oil pumps	Electric oil pumps
	Pressure accumulator	Pressure accumulator
	No added components	—
Engine control system		Crankshaft position sensor with reverse-rotation detector

**Figure2. Global market size of Idling stop system by system sector**

