

## **Global Air Bag System Market: Key Research Findings 2011**

### **◆ Research Outline**

**Yano Research Institute has conducted a study on global market of air bag systems with the following conditions:**

1. Research period: From June to September, 2011
2. Research target: Manufacturers of air bag modules, air bag ECU, and sensor devices
3. Research methodologies: Face-to-face interviews, survey via telephone/email and literature research

#### **What is the air bag system market?**

An air bag system, which was first used as a protector for a car passenger in the 1980s, is consisted of an air bag module and an ECU together with various sensor devices. An air bag module is made from a bag based on Nylon 66, an inflator to expand the airbag and various other materials such as resin cover. Sensor devices are installed at front and side of the car to send a signal at detection of possible collision to the air bag ECU (electric control unit), where it determines whether the collision really occurred or not and sends an order to an air bag module to inflate the air bag in the event of a collision.

This research covers analysis on air bag module, air bag ECU and sensor devices, and forecast of the global air bag system market in 2017.

### **◆ Key Findings**

- **With installation rate reached 75.5 %, number of air bag modules sold was 257.74 million units globally in 2010, out of which front air bag module occupied 42.2 %**

Estimated size of global air bag module market for FY 2010 was calculated as 257.74 million units. The largest numbers sold was front air bag modules, loaded for driver seat and/or passenger seat, marking 108.88 million units, occupying 42.2 % of the entire market, followed by side air bag modules, for protecting from a collision at the side of a car, sold 73.16 million units. Curtain air bags, for protecting the head of a passenger and for preventing passengers from popping out of the car, was sold 70.54 million units, and knee air bag, installed mainly in expensive cars was sold 5.16 million units.

- **Future increase of demand at emerging countries is predicted to boost sales of air bag modules to 446.29 million units by 2017, attaining 8.2 % of compound annual growth rate from 2010 to 2017**

Number of air bag modules in North America, Europe and Japan is expected to increase due to legal and security objectives. However, since the air bag modules have already attained high installation rate in those advanced countries, the market henceforth is likely to be driven by emerging countries like China and India. The global market for 2017 is expected to reach 446.29 million units.

### ◆ Report format

Published report: “Airbag System Market 2011 to 2012”

Issued on: September 28, 2011

Language: Japanese

Format: 110 pages in A4 format

Price: 136,500 yen (6,500 yen of consumption tax shall be charged for the sales in Japan.)

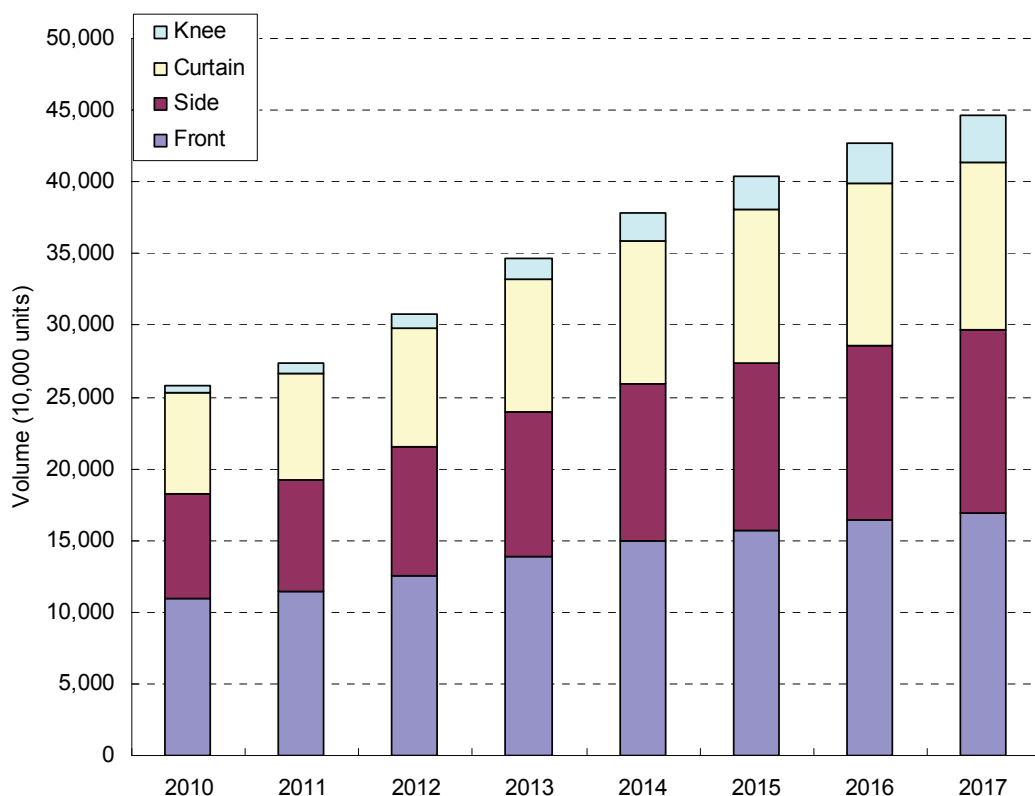
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- **Forecast of Global Shipping Volume of Airbag modules by type**



(10,000 units)

	2010	2011	2012	2013	2014	2015	2016	2017
Front	10,888	11,392	12,579	13,924	14,930	15,753	16,402	16,894
Side	7,316	7,870	8,968	10,078	10,968	11,619	12,212	12,783
Curtain	7,054	7,424	8,277	9,241	10,010	10,684	11,258	11,655
Knee	516	631	1,013	1,433	1,885	2,394	2,844	3,297
Total	25,774	27,316	30,838	34,677	37,793	40,449	42,716	44,629
Y-on-Y comparison		106.0%	112.9%	112.4%	109.0%	107.0%	105.6%	104.5%

Notes:

Based on the shipping volume from manufacturers of air bag modules

Actual values used for 2010, prospected figures for 2011 and forecast figures for 2012