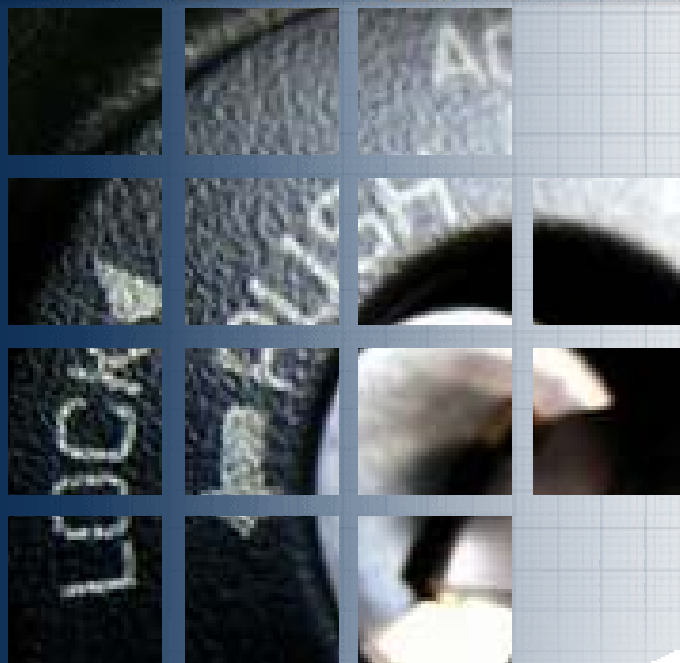


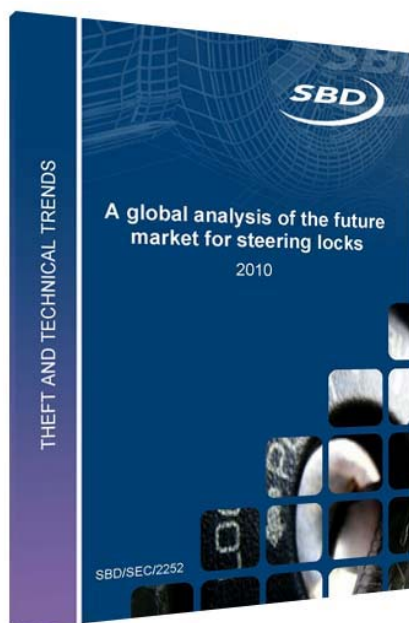
Advances in technology threaten mechanical steering lock market share



Mechanical steering lock solutions are not compatible with new technology trends in developed markets but will remain in demand on low cost vehicles especially for emerging markets...

Mechanical and electrical steering and transmission lock suppliers' concerns over the future of their products prompted SBD to produce this report that analyses the impact of global technology developments in this market.

Asian, European, North American and emerging market forces are strategically evaluated in order to give a complete view of the opportunities and threats to these conventional vehicle security components.



This report will help you:

- Understand the effect of legislation changes in the North American market on the necessity of steering locks
- Forecast future global volumes of mechanical immobiliser products up to 2015
- Identify how the market for low cost vehicles is influencing the choice of security components like mechanical steering locks
- Recognise how increased demand and fashion for electric vehicles and in vehicle technologies is making an impact on component fitment

The purpose of this report is to look at how factors like new technologies, common global designs, reduction in cost and weight, and electric/hybrid vehicles could affect the future demand for steering column locks compared to alternative solutions to the security legislation needs.

For additional information please email jappleby@sbd.co.uk or telephone Juanita on +44 (0) 1908 305101 and she will be happy to deal with your enquiry.



»» Future of steering locks determined by need for low cost...

The future of steering locks will be determined by the global need for vehicles that require a low cost solution. Value for money is the key phrase when selling cars in emerging markets. Vehicles must not only be at a low purchase price but be cost effective to run and maintain. Therefore, the simple solution provided by a proven design such as a mechanical steering lock will continue to be required. The same is likely for commercial vehicles in both developed and emerging markets where the driving factors are performance and cost.

On higher grade passenger cars, Smart Key technology and the associated trend for push button start will mean that an electric solution is more likely. Electronically controlled locking systems (either steering, transmission or parking brake) only require an electronic code to be sent to unlock the system, whereas mechanical or electro-mechanical locks require the driver to physically disengage the lock which defeats the convenience of the new technologies.

SBD believe that transmission locks and (within the next 5 years) electronic parking brake systems are likely to gain market share compared to electric steering locks. This is because of their advantage of being easier to integrate across multiple platforms and models and have the potential of serving a dual purpose, therefore eliminating one system from the vehicle.

In North America, legislation allows immobilisers to be considered as an alternative to a physical lock design and this has inevitably led to a trend for deletion of physical locks to save cost.

Alternative fuelled vehicles were predicted to adopt many more new technologies in their overall design, but so far SBD have not yet seen much evidence of this. Items such as Steer-by-Wire and Electric Wheel Hub motors have not reached volume production models. If and when they do they are likely to be accompanied by transmission lock designs or braking solutions once they are legally approved.

Globally, the trend for new technology that is threatening mechanical steering lock volumes is almost balanced by the future demand from emerging markets for low cost vehicles. These models require a simple, tried and tested solution and suppliers that can demonstrate the lowest weight, lowest cost but suitable strong designs will claim a significant competitive advantage.

The challenge for existing steering lock suppliers will be to capture the business for these new low cost models away from cheap local suppliers, especially for domestic brands in countries like India and China where there is a strong growth in sales for domestic brands.



»» ...know what tomorrow brings

TABLE OF CONTENTS

1. Executive summary

- 1.1 Introduction
- 1.2 Summary of the current situation
- 1.3 Which new automotive technologies could drive further change?
- 1.4 Is there a market for steering locks in the future?
- 1.5 Continued supply of SCL's to the LCV market

2. SCL technology and alternative solutions

- 2.1 Mechanical SCL systems
- 2.2 ESCL systems
- 2.3 Transmission locks
- 2.4 Electronic parking brakes
- 2.5 Security performance

3. The impact of legislation

- 3.1 UNECE
- 3.2 USA & Canada

4. The impact new technology

- 4.1 The influence of new fuel technologies
- 4.2 Designing for low cost cars
- 4.3 Smart Key systems
- 4.4 Enhanced Key Fobs

5. Developed markets

- 5.1 Europe
- 5.2 North America
- 5.3 Japan

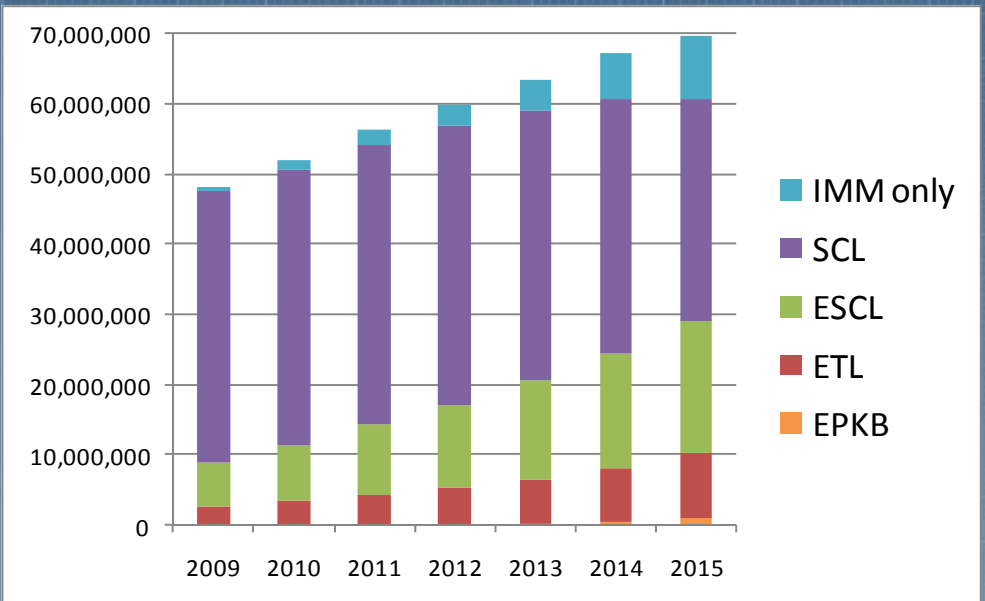
6. Emerging markets

- 6.1 BRICs
- 6.2 Brazil
- 6.3 Russia
- 6.4 India
- 6.5 China
- 6.6 ASEAN
- 6.7 Mexico
- 6.8 South Korea
- 6.9 Other markets

LIST OF FIGURES

- Fig. 1 SBD forecast of global steering lock market for passenger cars
- Fig. 2 Saab transmission lock
- Fig. 3 BMW X5 Steptronic transmission lock location
- Fig. 4 Countries using ECE directives
- Fig. 5 Europe (EU15) market forecast
- Fig. 6 North America market forecast
- Fig. 7 Japan market forecast
- Fig. 8 2009 key market passenger car sales
- Fig. 9 BRICs market forecast
- Fig. 10 Average household disposable income in India
- Fig. 11 Developing markets (non BRICs) forecast

SBD forecast of global steering lock market for passenger cars



The SBD Mission...

... to provide our customers with the knowledge, insight and understanding they need to develop class leading Telematics and Vehicle Security products and improved Cost Of Ownership performance

About the report author...



Rob Hare – Security and Cost of Ownership Specialist

With over 15 years experience of advising manufacturers on vehicle security and over 30 years locksmith experience, Rob is an expert in theft methods and the design and test of security systems from the concept stage to start of production. He is a Fellow Member of the Master Locksmiths Association, a member of the International Association of Auto Theft Investigators and a Metropolitan Police-trained Stolen Vehicle Examiner.

Pricing:

Report	Electronic pdf copy
2252 - A global analysis of the future market for steering locks	£1600 / €2000/ \$3200

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Reference SBD/SEC/2205



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This database provides an up to date picture of the smart key market in Europe. The database lists each system by manufacturer and model, grade availability and option cost where applicable as well as including details of the features of the system illustrated with numerous photographs to ensure a good understanding of the range of solutions currently in use.

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What makes a good smart key system? Part 3 - Technology

This report looks at the current European market for smart key systems, focussing on both the vehicle manufacturer implementation and the suppliers' current and future strategies. It analyses each of the technologies currently available for the four main features of a smart key system; smart unlock, smart lock, smart start and emergency start. For each technology, the report details the benefits and drawbacks using our unique insight.

Reference SBD/SEC/2207



The market for Smart Key and Keyless Entry in the USA

This report details how American consumer attitudes and usage of RF control for lock/unlock has created underlying issues towards the slow growth of Smart Key in the USA. However, the report's analysis of fitment strategies and possible motivators predicts an increase in Smart Key system sales and helps vehicle manufacturers realise how they can increase the acceptance of this technology.

Reference SBD/SEC/2018



Car theft and security trends in North America

This report provides analysis of the market status in the USA and Canada. Recent legislative changes allowing the deletion of the steering lock when an electronic immobiliser is fitted gives vehicle manufacturers cost saving opportunities. This research is essential for any company focused on North America, providing a comprehensive and cost-effective guide to the world's biggest market.

Reference SBD/SEC/2134