

The total market value for smart key could treble in size from €7 billion to €20 billion by 2019.



Understand the opportunities for suppliers to compete in this rapidly growing market where Continental currently dominate.

SBD's Global Smart Key Forecast analyses how system penetration and sales will develop in the next 5 years. >>>



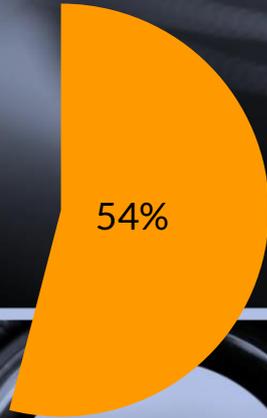


# Insight

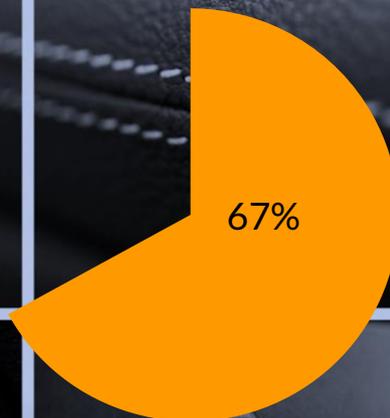
## % market share for Continental 2013

*There is a real shift in the adoption of smart key between world markets. Currently Continental dominates, but where are your opportunities?*

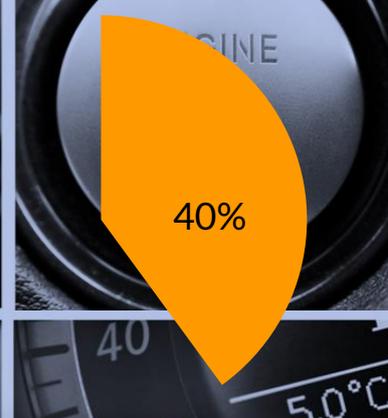
EU



USA



China



In a market that is set to treble in growth from €7 billion to €20 billion by 2019, SBD provides analysis of the future smart key market. To date Continental are dominating the market, but what will the outlook be by 2019 and how could other suppliers and OEMs take advantage of this expanding market opportunities?

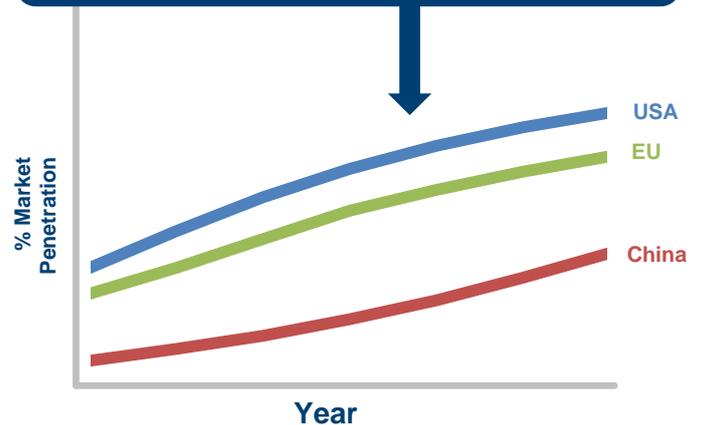
### Other market trends:

The EU and USA markets are expected to experience a steady level of growth, however, the infancy and potential of the Chinese vehicle market suggests that there will be considerable growth of smart key across all vehicle segments in the short-term.

The USA and China generally follow a traditional scaling of vehicle segment versus fitment. For example, A and B segment vehicles only feature basic technologies where C and D feature a higher specification and therefore more likely to include smart key. The pattern emerging in the EU market is a more balanced strategy, where OEMs are starting to offer similar levels of equipment for their A and B segments as available in the C and D segments,

highlighting a more aggressive smart key strategy for entry level vehicles.

The market penetration of smart key technologies is expected to be growing faster in China than in Europe and the USA by 2018



*China is expected to see rapid growth in the take-up of smart key technology over the next 5 years. Whilst Europe and USA markets are experiencing steady growth, the market penetration of smart key in China is expected to double by 2017 from the situation today.*

SBD's smart key forecast includes both optimistic and pessimistic market projections in order to account for a number of potential growth scenarios and to provide a more realistic market outlook.



# 2014 Global Smart Key Forecast

Ref: SEC/537

This Global Smart Key Forecast research takes an in-depth look at the growth potential, by region, by vehicle segment and system type. How will the fitment of smart start only systems on A segment vehicles in the USA compare with the fitment of combined smart entry and start systems on C segment vehicles in the Chinese market?

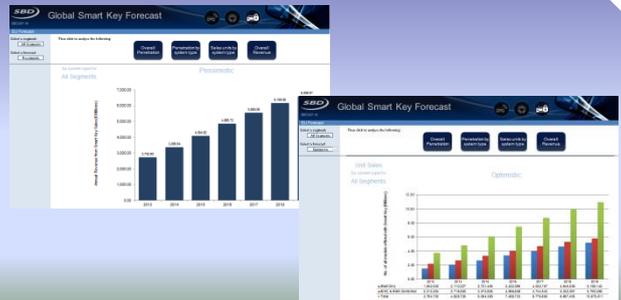
Our forecast content...



Forecast  
2013-2019

## OVERALL TRENDS

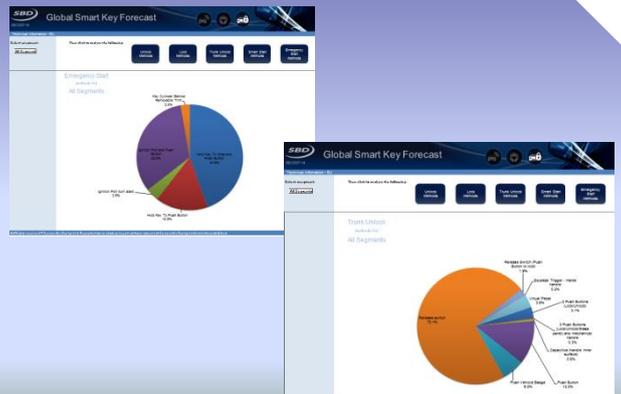
- Overall penetration
- Penetration by system type
- Unit sales by system type
- Overall revenue



Smart Key Features  
2013

## SERVICE TRENDS

- Unlock methods
- Lock methods
- Trunk unlock
- Smart operation methods
- Emergency operation



Market Specific Data  
2013

## SUPPLIER TRENDS

- Market share by supplier
- OEM contracts by supplier



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## About the Authors



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Callum graduated from the University of Warwick with an honours degree in Automotive Engineering. As an Analyst in the Secure Car division, Callum primarily specialises in smart key technology and associated device trends, whilst also coordinating the UK Insurance Group Rating process for one of SBD's established clients.



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Mike graduated from the University of Birmingham with a degree in Electronic and Electrical Engineering. He is a Chartered Engineer and a Member of the Institution of Engineering and Technology. Mike has over 30 years of experience in a variety of technical, management and consulting roles in Europe, Asia and North America.

## Related Reports



**Secure Car - Global Smart Key Database**

Ref: SEC/532

SBD's latest issue of the Global Smart Key Database looks at three key markets of Europe, USA and China. This database compares fitment policies of all of the main vehicle manufacturers in these markets and highlights which models are fitted with systems as standard or as a cost option. It categorises different system types in easy to follow terminology, additional information on system pricing and suppliers is also provided.



**EU Smart Key End Users Survey**

Ref: SEC/540

This end-user survey clarifies consumer opinions and awareness about smart key systems and identify the most liked or disliked features of those systems. The survey targets both existing users and those consumer who are yet to experience the benefits of smart key to identify what vehicle manufacturers need to do to encourage a further increase in demand for this technology.



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