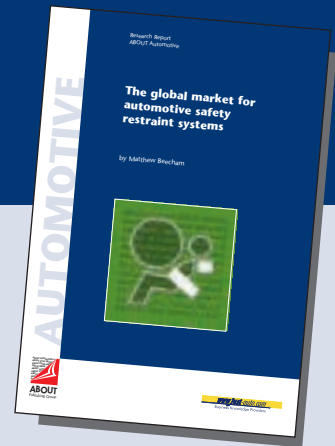


# The global market for automotive safety restraint systems: 2004 edition

A seatbelt for every seat and airbags for the front seat occupants are the norm these days. While frontal and side airbag design has caught much of the limelight in terms of interior safety systems over the last decade, some vehicle makers are fitting safety equipment below the steering wheel in an effort to protect all parts of the occupant's body. Although most of today's safety systems are passive, manufacturers predict a move toward passive-active.

The delivery value content per vehicle has risen 70% over the last ten years to around \$230 per car today. With no signs of abatement, manufacturers expect year-on-year growth of around 5%. The real growth will occur as adaptive airbag systems permeate the North American marketplace. Manufacturers say these early systems will increase the supply value by as much as 50%. In Europe, double pre-tensioning system fitment to each seat and side airbag protection is also spelling out good news for manufacturers.



## Manufacturer profiles

- Autoliv
- Key Safety Systems
- Delphi
- Takata
- TRW
- Dalphimetal
- Nihon Plast
- Toyoda Gosei

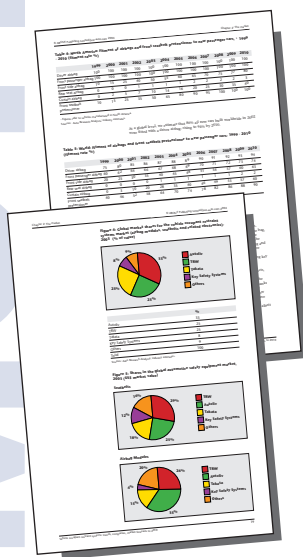
## Report coverage

The 2004 edition of this report reviews the key market drivers for vehicle occupant restraint systems, extending and updating the analysis previously published in 2001. This report is published in association with just-auto.com.

**Chapter two** sets out our revised fitment forecast for frontal, side, curtain and rear airbag applications and front seat pre-tensioner seatbelts through 2010.

**Chapter three** reviews the technical advances in vehicle occupant restraint systems, including the latest advanced airbag technologies, inflatable seatbelts as well as the latest developments in pedestrian protection.

**Chapter four** provides brief profiles of the major airbag module and seatbelt manufacturers, namely Autoliv, Breed Technologies, Delphi Corp, Nihon Plast, Takata, TRW and Toyoda Gosei.



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