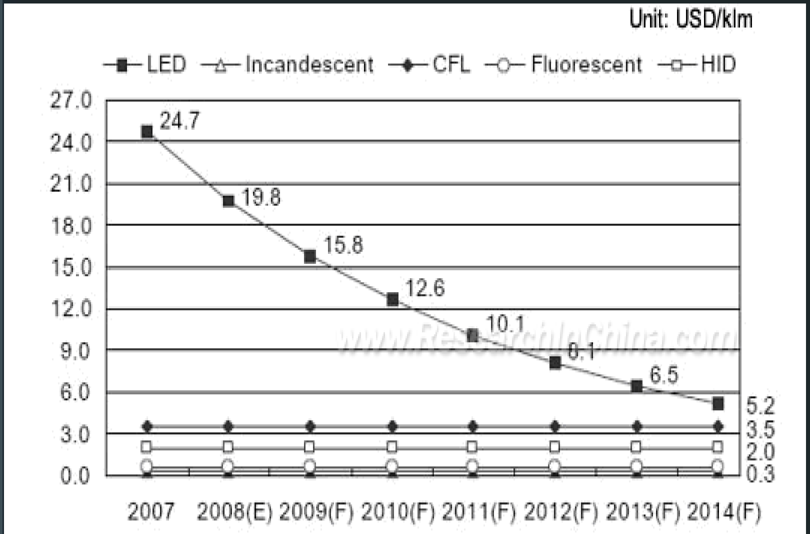
Global and China Automotive LED Lighting Industry Report, 2008-2009

Supposing the LED industry keeps developing at the current speed, the LED will be in line with the traditional light source level in 2014. The cost of the light source only takes up very small proportion of automotive headlight. If the automotive LED headlamp has the same illuminating effect as the headlamp made of the traditional light source, their cost gap won't be more than 10%. Currently the LED headlamp cost is 30% higher and even two times of the HID headlamp, and the mainstream cars are against such a big cost difference.

Cost & Illumination of Five Types of Automotive Lamps, 2007-2014



Source: ResearchInChina

From 2008 to 2013, the auto headlight manufacturing will remain the slow development. It is forecast that it will see the fast improvement in 2014. 50% high-mount brake lamps were made of LED in 2008 and this proportion will reach 100% in the future; 10% steering lamps were made of LED in 2008 and this proportion will reach 50% in 2015; only 10% width lamps were made of LED and this proportion will reach 30% in the future. In spite of huge market room, the price competition is quite intense and the price would fall by a big margin, hereby the market growing ability is not strong enough.

Besides increasing the LED luminous efficiency and lowering the average illumination cost, it is also very necessary to solve the heat dissipation problem. The optical fiber-distributed lighting might be the best choice. If the technique of such lighting pattern achieves its maturity, the LED headlamp can be equipped into the low-temperature trunk instead of the vicinity of the high-temperature engine. Only an LED module is needed in the trunk, and then the optical fiber can transmit the light to every reachable area, which perfectly simplifies the design and minimizes the volume of the auto lamp.

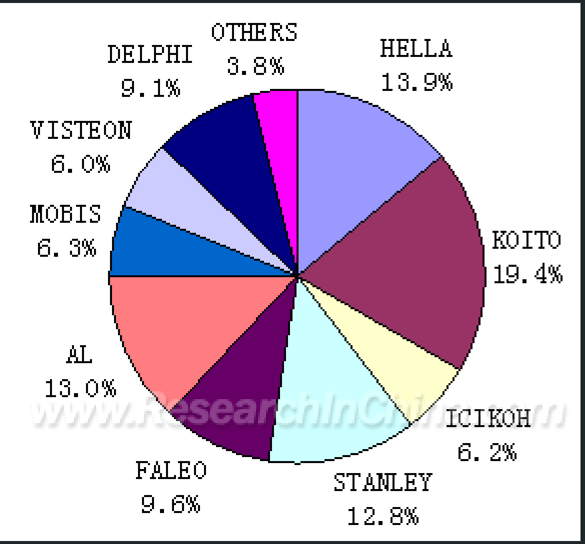
Global Auto Headlamp Market Size, 2008-2015

USD million	2008	2009	2010	2011	2012	2013	2014	2015
Headlamp	25	30	35	45	64	83	122	156
Others	640	610	670	729	798	862	940	1196

Source: ResearchInChina

The global automobile industry has very clear group division. The German group and the Japanese group have built the vertical supplying system for years and the companies from other countries hardly have opportunities to participate in this system. The American automakers keep not so close a relationship with the suppliers, so other automakers still have certain chances. The Japanese auto market is monopolized by the three lighting companies, namely, Koito, Ichikoh and Stanley. Nissan has long-term partnership with Renault, so it also purchases the lamps from Valeo. In addition, the American automakers have numerous suppliers like Delphi, Visteon, HELLA and Stanley etc. The German automakers' suppliers consist mainly of HELLA and AL. The French automakers undoubtedly choose their local company Valeo as the supplier. Similarly, Italy chooses AL, which is affiliated to the Italian FIAT Corporation. The South Korean suppliers contain Mobis and Sunlush.

Market Share of Global Automotive Lighting Manufacturers in 2008



Source: ResearchInChina

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