

## Global and China Automotive Lighting Industry Report, 2009-2010



Although LED has many advantages, it is not as good as xenon lamp in cost performance. While LED will see price drop, xenon lamp will further have its cost reduced and deliver better cost performance than LED will do. Xenon lamp also does better than LED in power consumption and energy conservation. With the biggest disadvantage in heat dissipation, a problem that is hard for LED to tackle in a short time, LED headlights are unlikely to become the mainstream in the next decade.

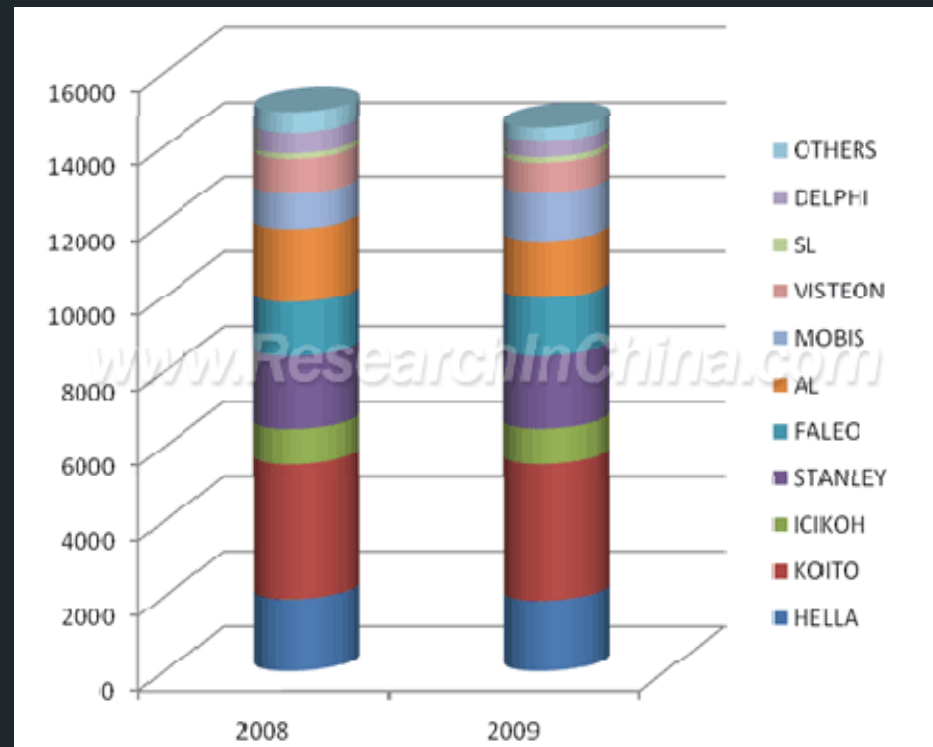
Becoming more and more popular, xenon lamp has expanded its application from luxury cars to top-configured mid-class cars, and may become a standard configuration for mid-class cars in the future. However, in the field of compact cars and small cars, halogen lamp shows obvious cost advantages. As the penetration rate of xenon lamp is about 32% at most, LED may still have growth potential. For example, Audi A8 replaced xenon lamp with LED at the end of 2009, because LED has more comprehensive performance, and does better especially in rainy, snowy or foggy conditions.

The growth of the penetration rate of xenon lamp in China is much higher than the global level, because the growth of luxury cars in China ranks first in the world. It's estimated that China's penetration rate of automotive xenon lamp will rise from 5% in 2009 to 26% in 2014. In China, while the sales growth of ordinary cars declined significantly in 2010, the sales of luxury cars soared.

From January to May of 2010, BMW, Mercedes and Audi, three luxury German brands, only achieved a global sales growth rate of over 10%, but their year-on-year sales growth rates in China were 107%, 118% and 39.9% respectively in May. In H1 2010, FAW-VW Audi sold 108,600 automobiles in total, exceeding the cumulative sales of the first nine months of last year, up 64% year on year. 93,993 Audi cars made in China were sold out, up 57% year on year. 14,607 imported Audi cars were sold in H1, up 139%. In contrast, the grass-roots BYD F3 only gained the growth rate of 1.97% in H1 2010, Excelle got -10.32%, Jetta 1.93%, Elantra Yue Dong 2.68%, Elantra -4.44%, and Santana – 38.4%.

Skoito, Ichikoh and Stanley, three major Japanese automotive lighting companies, have delivered steady performance. Although being a member of Toyota Moto Corporation, Skoito has successfully won cooperation of German brands, and in particular, accounted for over 40% of the supply for Shanghai Volkswagen, snatching some market shares of Magneti Marelli. Stanley has built a solid relationship with American brands, grabbing some market shares of Delphi and Visteon. Ichikoh, only focusing on the Japanese market, has a difficult time. The three major European automotive lighting companies - Valeo, Hella and Magneti Marelli (AL), especially Magneti Marelli, a Fiat Group company, perform unsatisfactorily. Mobis and SL of South Korea not only monopolize the South Korean auto brands market, but also occupy some General Motors market shares.

### Market Shares of Automotive Lighting Manufacturers in the World, 2008-2009



# Table of Contents

- **1. Global Automobile Industry and Market**
- **2. China Automobile Market**
  - 2.1 Overview, H1 2010
  - 2.2 Passenger Car Market, 2010
  - 2.3 Commercial Vehicle Market, H1 2010
  - 2.4 Import & Export, 2010
  - 2.5 Sedan Consumption Trends
  - 2.6 Financial Data, 2005-2010
  - 2.7 China Automobile Industry
- **3. Automotive Lighting Source**
  - 3.1 Automotive Lighting Overview
  - 3.2 Automotive Lighting Source Overview
  - 3.3 Advantages of LED Light Source
  - 3.4 Automotive LED Lighting
    - 3.4.1 Prius LED headlamp
    - 3.4.2 Cadillac Escalade Platinum
    - 3.4.3 New Audi A8
  - 3.5 Luminance Distribution of LED Headlight
    - 3.5.1 Reflection
    - 3.5.2 Projection
    - 3.5.3 Imaging Lens, Total Reflection Lens, DOE Lens
  - 3.6 Heat Dissipation of LED Automotive Lamp
  - 3.7 LED Automotive Lamp Market
  - 3.8 HID Xenon Lamp
    - 3.8.1 Overview
    - 3.8.2 New Models Equipped with HID Xenon Lamps
    - 3.8.3 Market
  - 3.9 Adaptive Front-lighting System (AFS)
- **4. LED Industry**
  - 4.1 Industry Chain
  - 4.2 Midstream - Epitaxy
  - 4.3 Downstream - Packaging
  - 4.5 Geographical Distribution

- 4.6 China LED industry
- **5. Automotive Lighting Industry and Market**
- 5.1 OEM Market
- 5.2 Global Automotive Lighting Industry
- 5.3 Supporting System of Global Automotive Lighting
- 5.4 China Automotive Lighting Industry
- 5.5 OEM Supporting System of China Automotive Lighting
- **6. Automotive Lighting Manufacturers**
- 6.1 Hella
- 6.2 Skoito
- 6.3 Ichikoh
- 6.4 Stanley
- 6.5 Valeo
- 6.6 Automotive Lighting (Magneti Marelli)
- 6.7 Visteon
- 6.8 TYC Brother
- 6.9 Changzhou Xingyu
- 6.10 Zhejiang Tianchong
- 6.11 Ta Yih Industrial
- 6.12 Delphi
- 6.13 SL
- 6.13 Liao Wang
- 6.14 DEPO
- **7. Major Automotive Light Source and High-power LED Manufacturers**
- 7.1 CREE
- 7.2 TOYOTA GOSEI
- 7.3 Nichia
- 7.4 Osram
- 7.5 PHILIPS

## Selected Charts

- Monthly Sales Revenue of China Automobile Industry, 2006-2010
- Annual Sales Revenue of China Automobile Industry, 2003-2010
- Monthly YoY Sales Growth Rate of China Automobile Industry, Jan 2008-May 2010
- Monthly Sales Revenue of China's Passenger Car Industry, Jan 2005-May 2010
- Monthly Sales Revenue of China's MPV Industry, Jan 2005-May 2010
- Monthly Sales Revenue of China's SUV Industry, Jan 2005-May 2010
- Revenue and Growth Rate of Top 10 Enterprises by Automobile Sales, Jan-May 2010
- Revenue and Growth Rate of Top 10 Enterprises by Passenger Car Sales, Jan-May 2010
- Revenue and Growth Rate of Top 10 Enterprises by Commercial Vehicle Sales, Jan-May 2010
- Prius LED Automotive Lamp
- Skoito's LED Automotive Lamp Roadmap
- Cadillac's Escalade Platinum LED Automotive Lamp
- Skoito's LED Projection Design
- LED Lens Optical Imaging System
- Total Reflection Lens Imaging
- DOE Lens
- Cost and Illumination of Five Automotive Light Sources, 2007-2014
- LED Automotive Lighting Market, 2008-2015
- Global Distribution of Sedan Headlight Illumination Light Sources, 2009-2014
- Distribution of Sedan Headlight Illumination Light Sources in China, 2009-2014

- LED Industry Chain
- Geographical Distribution of LED Output Value, 2008-2013
- Distribution of LED Output Value in China, 2009
- Market Shares of Automotive Lighting Manufacturers in the World, 2008-2009
- Major Automotive Lighting System Suppliers of Toyota, 2008
- Major Automotive Lighting System Suppliers of Honda, 2008
- Major Automotive Lighting System Suppliers of Nissan, 2008
- Major Automotive Lighting System Suppliers of GM, 2008
- Major Automotive Lighting System Suppliers of Ford, 2008
- Major Automotive Lighting System Suppliers of Volkswagen, 2008
- Major Automotive Lighting System Suppliers of Hyundai, 2008
- Market Shares of Major Automotive Lighting Manufacturers in China, 2008-2009
- Clients of Skoito, 2008
- Clients of Hella Changchun, 2008
- Revenue of Hella by Division, FY2009
- Revenue and Labor Cost of Hella, FY2004-FY2009
- Revenue and R&D Investment of Hella's Automotive Lighting Division, FY2004-FY2009
- Revenue and R&D Investment of Hella's Automotive Electronics Division, FY2004-FY2009
- Revenue and R&D Investment of Hella's Special Support and After-sales Division, FY2004- FY 2009
- Revenue of Hella by Region, FY2007- FY2008
- Revenue and Operating Margin of Skoito, FY2003- FY2010
- Revenue of Skoito by Product, FY2003- FY2009
- Revenue of Skoitoby Region, FY2008- FY2009
- Revenue and Operating Margin of Ichikoh, FY2004- FY2010

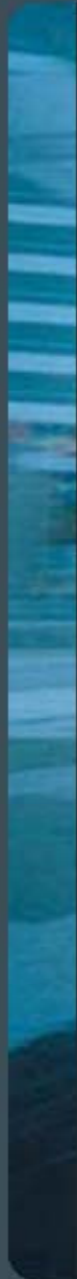
- Global Presence of Ichikoh
- Ichikoh's Presence in Japan
- Major Models Supported by Ichikoh
- Revenue and Operating Margin of Stanley, FY2004- FY2010
- Revenue and Operating Margin of Stanley's Automotive Lighting Division, FY2005- FY2010
- Revenue and Operating Margin of Stanley's Electronic Lighting Division, FY 2005- FY2010
- Sales Revenue of Valeo, Q1 2008-Q1 2010
- Gross Margin of Valeo, Q1 2008-Q4 2009
- Operating Margin of Valeo , Q1 2008-Q4 2009
- OEM Revenue of Valeo by Region, 2009
- Revenue and Operating Margin of Magneti Marelli, 2006-2009
- Reveue of Magneti Marelli by Division, 2009
- Revenue, Output and Employees of Automotive Lighting, 2008
- Reveue and Gross Margin of Visteon, 2004-2009
- Reveue of Visteon by Country, 2008-2009
- Reveue of Visteon by Product, 2007-2009
- Revenue and Operating Margin of TYC Brother, 2002-2010
- Clients of Changzhou Xingyu
- Major Models Supported by Changzhou Xingyu
- Revenue and Operating Margin of Ta Yih Industrial, 2003-2010
- Subsidiaries of Ta Yih Industrial
- Clients of Ta Yih Industrial, 2008
- Revenue and Gross Margin of Delphi , 2004-2009
- Reveue of Delphi by Region, 2005-2009
- Revenue and Operating Margin of DEPO, 2004-2010



- Revenue of Delphi by Product, 2006-2008
- Clients of Delphi, 2006-2008
- Revenue and Operating Margin of SL, FY2007-FY2011
- Revenue and Operating Margin of CREE, 2004-2010
- Global Presence of CREE
- Revenue of Toyoda Gosei by Product, FY2009
- Revenue and Operating Margin of Toyoda Gosei, FY2005- FY2010
- LED Revenue of Toyoda Gosei, FY2005- FY2011
- Revenue and Operating Profit of Nichia's LED Division, FY2004- FY2010
- Revenue and Operating Margin of Osram, FY2004- FY2008
- Revenue of Osram by Region, FY2008
- Revenue of Osram by Product, FY2008
- Employees of Osram by Region, FY2008
- Revenue of Philips Lighting by Region, FY2004- FY2008
- EBIT of Philips Lighting, FY2004-FY2008
- Revenue of Philips Lighting by Product, FY2009
- Monthly Revenue and Profit Growth Rate of Major Automotive Enterprises, Mar. 2009 – Mar. 2010
- Key Manufacturers of LED Industry Chain
- Equipment Quantity of Global Major LED Epitaxy Manufacturers, 2010 Year-end
- Equipment Quantity and Production Capacity of Epitaxy Manufacturers in Taiwan, 2008-2009
- Revenue of 21 LED Upstream Manufacturers in the World, 2008-2010
- Operating Margin of 9 LED Epitaxy Manufacturers in the World, 2008-2010
- Revenue of 7 LED Downstream Manufacturers in the World, 2008-2010
- Ranking of LED Epitaxy Manufacturers in China by Revenue, 2009

- Top 15 Automotive Lamp Manufacturers in China by Sales, 2009
- Major Clients of Automotive Lamp Manufacturers in China
- Financial Data of Hella Changchun, 2004-2009
- Financial Data of SL Beijing, 2004-2009
- Financial Data of Hella Shanghai, 2004-2009
- Financial Data of Hella Beijing, 2004-2009
- Operating Profit of Skoito by Region, FY2008-FY2009
- Major Models Supported by Skoito
- LED Automotive Lamp Sales Revenue of Shanghai Skoito, 2005-2009
- Financial Data of Shanghai Skoito, 2004-2009
- Revenue of Ichikoh by Region, FY2007-FY2010
- Revenue of Stanley by Region , FY2008-FY2009
- Operating Profit of Stanley by Region , FY2008-FY2009
- Financial Data of Stanley Tianjin, 2004-2009
- Financial Data of Stanley Guangzhou, 2004-2009
- Financial Data of Stanley Shenzhen, 2004-2008
- Financial Data of Stanley Suzhou, 2004-2008
- Financial Data of Valeo Hubei, 2004-2009
- Financial Data of Magneti Marelli Wuhu, 2005-2008
- Financial Data of Yanfeng Visteon, 2004-2007
- Financial Data of Changzhou Visteon-TYC, 2004-2009
- Financial Data of Changzhou Xingyu
- Products of Ta Yih Industrial
- Clients of Ta Yih Industrial
- Revenue of Delphi by Region, 2006-2008

- Financial Data of SL Yantai, 2005-2009
- Raytheon's Automotive Products
- Financial Data of Osram China, 2004-2008
- Revenue of Lumileds, 2005-2010
- Financial Data of Philips Automotive Lighting Hubei Co., Ltd., 2004-2009



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