



Global and China Automotive Lighting Industry Report, 2010-2011

Oct. 2011

This report

- ◆ **Analyzes the global and China automobile industry**
- ◆ **Focuses on the automotive lighting industry and market**
- ◆ **Highlights the operation of global automotive lighting vendors.**

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Abstract

Although the gloomy economy in 2011 makes people doubt about global economic recovery, the automotive market, especially the limousine market, presents buoyant development. In Jan.-Aug., 2011, the sales volume of Benz totaled 867,400 units worldwide, and the figures in Germany, America and China registered 165,500, 148,400 and 120,200, up 2.3%, 6.1% and 35.8%, respectively; and the global sales volume of BMW increased by 16.8% YoY to 1.0734 million units, and the figures in Germany, America and China reached 196,300, 155,900 and 158,900, rising 13.3%, 12% and 49.3% YoY, respectively.

The biggest change in automotive lighting industry is that LED boosts to penetrate the market. In 2010, LED suffered price slump in the wake of large capacity expansion. In brake-lamp and tail-lamp sectors, LED gets rapidly popular, with the targeted prevalence of 70% in 2015.

Another change is that LED head-lamps are massively applied in HEV or EV, rather than limiting to flagship models.

Before 2010, auto models that employed LED head-lamp only contained Lexus LS600H, Audi A8/R8 and Cadillac Escalade Platinum. Since 2010, LED head-lamp has embraced its blossom. For example, Nissan LEAF, developed by ICHIKOH, cuts its LED number to 2 ones, reducing half of power consumption and prolonging two-fold of service life while lowering the cost. Another case in point is Mitsubishi i-Miev, a type of EV similar to LEAF. Moreover, the latest LEXUS LS450H draws lesson from LS600H which fully employs LED.

In early 2011, BMW announced to equip LED headlights to its full range of new series 6 models. Audi followed suit, fully employing LED lights on EV A2 concept car as well as A3 e-tron concept PHEV. Additionally, Taiwan-based Yulon Motor's neora, Benz's level-A concept car scheduled to go public in 2012 plus CITEON's HEV DS5 have joined and will join the league.

According to the EU rule, all newly produced cars are required to add DRL (day-time running light) from 2011. Presently, 5-10% automobiles with DRL are provided with LED, and the figure is expected to rise to 25%-35% or more in the upcoming five years.

However, only a few manufactures can provide HB LED, including Lunileds, OSRAM and Nichia. For most LED manufacturers, automotive market makes limited contribution to their performance, even for Lumileds, OSRAM and Nichia. After all, the LED consumption in automotive sector is far less than that in consumer electronics.

The sales volume of cars equipped with LED head-lamps is estimated to hit roughly 8% by 2015. The mainstream head-lamp is still halogen, while for executive cars, Xeon tritium lights have become mainstream, with the popularity rate exceeding 80%.

Japanese automotive lighting manufacturers occupy supremacy, but weak in growth. For instance, Stanley, which focuses on Japanese market, has seen decline; Koito is expected to see moderate growth given its rooting in Mainland China. In contrast, driven by vigorous limousine market, German automotive lighting businesses present aggressive development. In particular, Hella, AL (Automotive Lighting), ZKW are all suppliers of Audi, BMW and Benz, with AL taking up the highest proportion. As for Taiwan-based TYC and DEPO, they focus on the after-sale market of Europe and America, and show slowdown in growth.

Revenue of Leading Automotive Lighting Manufacturers Worldwide, 2010-2011(Unit: USD mIn)

	2010	2011
HELLA	1,985	2,280
KOITO	4,097	4,108
ICHIKOH	925	908
STANLEY	1,966	1,856
VALEO	1,889	2,065
Visteon	552	608
Magneti Marelli	2,103	2,498
TYC	265	278
DEPO	304	309
TAYIH-IND	122	133
CHANGZHOU SHINYE	129	167
ZKW	378	544
SL	117	141

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