Global and China Automotive Lighting Industry Report, 2013

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

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Abstract

Global and China Automotive Lighting Industry Report, 2013 covers the followings:

1. Global Automotive Industry and Market
2. China Automotive Industry and Market
3. An Introduction to Automotive Lighting
4. An Introduction to LED Industry
5. An Analysis of Automotive Lighting Industry
6. An insight into 17 Automotive Lighting Companies
7. A Study of four Automotive Lighting LED Die Companies

Although China's economic growth slows down, the market of automobile, especially SUV and luxury car, is still prosperous. In the first seven months of 2013, China's output and sales volume of automobile reached 12.335 million and 12.230 million respectively, up 12.5% and 12.0% year on year separately. The sales volume of sedan in the first seven months was 6,268,935, an yr-on-yr increase of 14%, and the sales volume in July jumped by 10.8% year on year.

The cumulative sales volume of MPV in the first seven months was 647,585, up 32% year on year, and the sales volume in July increased by 12% year on year. The cumulative sales volume of SUV in the first seven months was 1,479,665, a surge of 49.3% year on year. The cumulative sales volume of crossover passenger car was only 973,996, down 8.3% year on year.

The automotive lighting market has changed little. Although the price of high-brightness (HB) LED die has declined sharply in the past year, LED die only occupies a very small share in the cost of LED head lamp, the costs of LED module, heat dissipation and optical engine are still much higher than the costs of xenon and halogen lamps. In addition, the test on reliability lasts at least three years in the automotive field, so the development of LED head lamp has been slow. Xenon lamp has developed fast, extending from high-end cars to mid-end cars, and may replace halogen lamp to become the dominator in the field of dipped headlight.

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Japanese companies have further expanded their market strongholds, and grabbed over market share from European companies. Koito occupies the largest share in the Chinese market, and almost monopolizes the market of automotive lamps for Shanghai VW, Shanghai GM and SAIC. Indian Varroc witnessed a decline of 20% in the first year after the acquisition of Visteon's automotive lighting business, indicating the need for adjustment.

Valeo's automotive lighting business is subject to the company's Visibility division, and the division focuses more on the Park4U parking assistance module which has a higher gross margin and is in the stage of market growth. Hella is dragged down by the European market, but it occupies a dominant position in the aftermarket of Japan, America and China, with quite a stable performance, since Taiwanese companies are merely concerned about the maintenance market and Japanese enterprises only focus on the OEM market.

Revenue of Global Major Automotive Lighting Companies, 2010-2013 (Unit: USD mln)

	2010	2011	2012	2013F
Hella	3,685	4,251	4,782	4,948
Koito	4,097	4,608	5,006	5,440
Ichikoh	925	1,098	1,008	958
Stanley	1,966	2,124	2,319	2,558
Valeo	1,889	1,902	1,890	1,890
Visteon (Varroc)	552	601	480	520
Magneti Marelli	2,103	2,409	2,560	2,580
TYC	465	485	510	518
DEPO	304	335	336	350
Ta Yih Industrial	122	142	160	158
Changzhou Xingyu	129	170	208	250
ZKW	378	547	535	558
SL	117	141	170	208

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