



# Global and China Automotive Instrument Industry Report, 2013

Dec. 2013

## 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.

## Abstract

### The report highlights the followings:

1. Recent Developments of Global Automotive Market;
2. Recent Developments of China Automotive Market;
3. Introduction to Automotive Instrument & HUD;
4. Study on Automotive Instrument Market;
5. Top 10 Automotive Instrument Makers;

In 2012, the market size of global automotive instrument industry claimed USD12.9 billion, with the targeted figure in 2013 and 2014 soaring to USD14.1 billion and USD16.2 billion, respectively. The big rise comes as the fact that low- and medium-range automotive models are shifting towards all-digital TFT-LCD instrument from mechanical ones while top-grade automobiles are mostly employing TFT-LCD with ever-increasing display size. For example, the latest edition of Benz S Class employs 12-inch TFT-LCD, so does Citro?n Grand C4 Picasso whose 12-inch TFT-LCD instrument were provided by Magneti Marelli.

Another driving force comes from HUD. It is very likely that Infotainment and HUD will integrate together. Moreover, a majority of instrument makers are also involved in the production of Infotainment, with cases in point including AisinAW and DENSO from Japan, Visteon and Delphi from the US, Continental from Germany and Mobis from South Korea.

Ranking of Top 9 Automotive Instrument Makers Worldwide by Revenue, 2012-2013		
	2012	2013E
Visteon	1,108	1,216
Denso	1,869	2,088
Continental	2,512	2,568
Faurecia	1,808	1,992
Johnson Control	1,068	1,202
Nippon Seiki	1,208	1,518
Yazaki	390	380
Magneti Marelli	460	450
IAC	1,012	1,116
Others	1,502	1,616

USD mln

Source: ResearchInChina

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By 2020, the worldwide sales volume of automobiles equipped with HUD is projected to jump from 1.2 million in 2012 to 15.8 million in 2012. And the figure this year is estimated to increase 7% over the preceding year. In 2012, only 2% sold automobiles were equipped with HUD, and the targeted figure by 2020 will grow to 19%. In 2010, the assembly rate of HUD system for Japanese cars topped the list, but Japan will lose out to Europe by 2020 in this regard. In addition, DLP is likely to replace high-priced laser projection, cutting down the cost substantially. Besides, LCOS technology will see breakthroughs and is likely to present striking performance in low-end HUD.

Leading HUD suppliers include Continental, Denso, Johnson Control and Nippon Seiki. Some Japanese auto Infotainment companies also show their interests in HUD market. Cases in point include Pioneer and J&K, which made intensive efforts to make inroad in HUD market by employing DLP and LCOS technologies. And the limousine market grabs a larger piece of the pie. Continental enjoys a lion's share in the limousine instrument market, with the market share in HUD market surpassing 50%, followed by Denso with the proportion of roughly 15% and the major clients going to Toyota. HUD for Chevrolet Corvette under GM is provided by Japan-based Nippon Seiki, while Instrument Panel is provided by IAC.

In 2013, the market size of China automotive instrument industry approximated USD2.4 billion, with the expected figure by 2017 hitting USD4 billion. The massive surge is attributable to the reason that most of low- and medium-end passenger cars will replace old-fashioned mechanical instruments with all-digital TFT-LCD. For now, there have BYD models equipped with TFT-LCD instrument.

SDE is primarily focused on homemade passenger car market and it offers low-range instrument for nearly all homemade cars except BYD; YFV has big customers including SVW, SGM, Changan Ford, SAIC Motor, and Dongfeng Nissan; DENSO is instrument provider for Toyota; for Continental, main customers cover FAW-VW, Beijing Benz Automotive, BMW Brilliance Automotive, Wuhu Chery, and Ford Nanjing.

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1.1. Global Automotive Market

1.2. Global Automotive Industry

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