



# Global and China Automotive Lighting Industry Report, 2013-2014

Sep. 2014

## 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

Global and China Automotive Lighting Industry Report, 2013-2014 covers the followings:

1. Global automotive industry and market
2. China automotive industry and market
3. Automotive lighting technology trends and LED industry
4. Automotive lighting market and industry
5. 18 automotive lighting companies

The global automotive lighting market size hits approximately USD26 billion (including USD21.2 billion generated by OEM) in 2014, representing an increase of 8.8% over 2013. The growth of the OEM market is mainly driven by two factors:

First, the automobile shipment in China and the United States surges, especially the Chinese market has still maintained the growth rate of about 10% after the high-speed growth in 2013. Second, the extensive use of xenon lamps and LED raises the unit price.

By 2015, China's economy will slow down further, so that the automotive market can not continue to grow at 10%, whilst the American market will also decelerate. The global automotive lighting market is estimated to be USD27.6 billion in 2015, up 6.2%.

Ranking of Major Global Automotive Lighting Companies by Revenue, 2013-2014  
(USD mln)

	2013	2014
HELLA	3,934	4,110
KOITO	5,940	6,250
ICHIKOH	878	880
STANLEY	2,371	2,516
VALEO	1,890	1,916
Varroc	520	580
Automotive Lighting(Magneti Marelli)	3,080	3,260
TYC	556	650
DEPO	460	508
Ta Yih Industrial	142	181
Changzhou Xingyu	264	278
ZKW	846	998
SL	658	702
Mobis	550	590

The most important automotive lighting parts ----- headlights are commonly divided into the following categories.

- ➔First, halogen high and low beams equipped with reflecting bowls for most low-end automobile models.
- ➔Second, halogen high beams combined with reflecting bowls as well as xenon low beams installed with single projector lens adopted by Japanese and US-based mid-range cars due to low costs.
- ➔Third, xenon high and low beams equipped with bi-xenon projectors used by German mid-range cars extensively.
- ➔Fourth, LED lights suitable for a small amount of top cars (such as Audi R8 and Mercedes-Benz S series) and a few mid-range cars.
- ➔Fifth, halogen high and low beams, but high beams combined with projector lens.

In the global market, the second and third categories will seize 10% share each, while the fourth category 7% in 2016. However, unique Chinese consumers are keen on new technology and the luxury car sales volume growth rate is much higher than low-end models under the context of exacerbated wealth disparity, so the proportion of xenon lamps in China exceeds the global average level. The second category is expected to occupy about 13% share and the third category 14% in 2016.

The fast-growing Chinese market has stimulated producers to conduct massive capacity expansion. Hella's Jiaxing Plant went into production in April 2014 and is expected to realize the design capacity (3 million headlights and 1.8 million taillights annually, including halogen, xenon and LED lights) in 2016, which doubles the current capacity.

The world's largest automotive lighting company Koito invested in building its third base in Xiaogan of Hubei Province in September 2014, following the ones in Shanghai and Guangzhou. The new base is expected to be put into operation in July 2016.

Valeo's Shenyang Plant will begin to run in December 2014, with the investment of USD100 million.

In early 2014, Magneti Marelli and CSGC Hubei Huazhong Photoelectric Science and Technology Co., Ltd, signed a 50/50 joint venture agreement for the production of headlamps and rear lamps in Xiaogan, Hubei for motor vehicles in China. According to the planning, the production will commence in Q1 2015.

Koito develops soundly as the largest lighting supplier of Toyota and GM; meanwhile, its shipment to Volkswagen increases year after year. Unlike Koito who is good at lens design and manufacturing, Hella specializes in electronic manufacturing and mainly serves customers in Europe. The rising star ----- ZKW is one of main suppliers of Mercedes-Benz and Audi. TYC and DEPO target at the maintenance market and develop smoothly.

Small companies also embrace Wipac, India-based Fiem, Turkey-located Farba, Brazil-based Arteb, Magna in Canada, Grote in USA and Schefenacker of Germany.

### **1. Global and Chinese Automotive Market and Industry**

- 1.1 Global Automotive Industry
- 1.2 Global Automotive Market

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