



# Global and China Automotive Lighting Industry Report, 2014-2015

Sep. 2015

## 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, 2014-2015 focuses on the followings:

1. Global automobile market and industry;
2. China automobile market and industry;
3. LED industry and market;
4. Automotive lighting industry and market;
5. 18 typical automotive lighting companies.

Global automotive lighting market size was USD25.3 billion in 2014, and is expected to grow by 10.8% to USD28 billion in 2015, the highest growth rate since 2010, and reach USD30.1 billion in 2016, a year-on-year rise of 7.5%.

There are two reasons for significant expansion of automotive lighting market. One is substantial improvement in the penetration of LED. As the price of LED chip continues to drop, more and more companies adopt LED to make headlamps. Despite the price of LED chip declines, LED headlamps are still more expensive than halogen lamps. About 4% of headlamps were made of LED in 2014. The figure rose to 7% in 2015 and is expected to hit 15% in 2017 and 21% in 2020, as a growing number of companies employ LED in the pursuit of emotional or aesthetic appearance.

The other reason is the use of ADB/AFS. The penetration of AFS will arrive at 15% in 2015, and that of ADB 3% in the year and is predicted to stand at 10% in 2020 and 25% in 2025. The adoption of ADB makes headlamps more complicated and raises the cost. In addition, laser headlamps and OLED tail-lamps have come into being. The penetration of laser headlamps, which are extremely expensive, is expected to reach 15% in 2025.

Global economic downturn, especially the economic slowdown in China, will prolong the downward trend in the Chinese automobile market over the next couple years, thus slowing expansion of the automotive lighting market. Moreover, the deflation has been severe.

From the perspective of industry, big companies hold an increasingly dominant position, finding a higher rate than small ones in terms of revenue growth. Valeo is expected to be the one performing best in 2015 with a growth rate of up to 19%. Valeo won nearly 90% of headlamp orders of Volkswagen's Passat B6 platform and 1/3 of Audi's headlamp orders. The competitor- Hella is suffering market share contraction.

## Ranking of Global Major Automotive Lighting Companies by Revenue, 2013-2015

<i>(USD mln)</i>	<b>2013</b>	<b>2014</b>	<b>2015</b>
HELLA	3,492	3,903	4,360
KOITO	5,940	5,880	6,560
ICHIKOH	878	880	856
STANLEY	2,371	2,302	2,510
VALEO	2,008	2,252	2,690
Varroc	520	748	750
Automotive Lighting (Magneti Marelli)	3,080	3,460	3,820
TYC	556	618	540
DEPO	460	484	490
Ta Yih Industrial	142	163	191
Changzhou Xingyu Automotive Lighting System	264	320	350
ZKW	846	980	1,220
SL	1,080	1,290	1,310
Mobis	550	490	450

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

- 1.1 Global Automotive Market
- 1.2 Overview of Chinese Automotive Market
- 1.3 Recent Development of Chinese Automotive Market

### **2 Automotive Lighting Technology**

- 2.1 Profile of HID Xenon Lamps
- 2.2 Typical Automotive Headlight Design
- 2.3 Headlight Design Trends
- 2.4 Laser Automotive Lighting
- 2.5 OLED Automotive Light
- 2.6 ADB/AFS

### **3 LED Industry**

- 3.1 LED Automotive Lighting Market
- 3.2 Automotive Interior LED Lighting
- 3.3 Automotive Exterior LED Lighting
- 3.4 LED Industry Chain
- 3.5 Geographical Distribution of LED Industry
- 3.6 Ranking of Global Top 30 LED Companies by Revenue , 2012-2014
- 3.7 Taiwan LED Industry
- 3.8 Summary of LED Industry in Mainland China, 2014

### **4. Automotive Lighting Industry and Market**

- 4.1 Automotive Lighting Market Overview
- 4.2 Automotive Lighting Market Size
- 4.3 Global Automotive Lighting Industry
- 4.4 Global Automotive Lighting OEM System
- 4.5 China Automotive Lighting Industry
- 4.6 China's Automotive Lighting OEM System

### **5. Automotive Lighting Companies**

- 5.1 Hella

- 5.1.1 Changchun Hella

- 5.2 Koito

- 5.2.1 Shanghai Koito

- 5.2.2 Guangzhou Koito

- 5.3 Ichikoh

- 5.4 Stanley

- 5.4.1 Guangzhou Stanley

- 5.4.2 Tianjin Stanley Electric Co., Ltd.

- 5.5 Valeo

- 5.6 VARROC

- 5.6.1 Changzhou Damao Visteon

- 5.7 Automotive Lighting (Magneti Marelli)

- 5.8 TYC

- 5.9 DEPO

- 5.10 Ta Yih Industrial

- 5.11 Changzhou Xingyu

- 5.12 Jiangsu Tongming

- 5.13 ZKW

- 5.14 Liaowang Automotive Lamp

- 5.15 SL

- 5.16 Zhejiang Tianchong

- 5.17 Laster Tech

- 5.18 FIEM

### **6. Automotive Lighting LED Companies**

- 6.1 Nichia Chemical

- 6.2 Toyoda Gosei

- 6.3 OSRAM

- Sales Volume of Major Global Automobile Brands, 2010-2015
- Production of Light Vehicles by Region , 2013-2015
- Sales Volume of Automobile in China, 2005-2015
- China's Automobile Output YoY Growth Rate by Type, 2008-2015
- Audi A6 3.5 FSI Headlamp
- BMW 730Li Headlamp
- Mercedes-Benz S320L Headlamp
- Honda 9-generation Accord Headlamp
- Peugeot 508 Headlamp
- Global Sedan Headlamp Light Source Distribution, 2009-2016E
- China's Sedan Headlamp Light Source Distribution, 2009-2016E
- Audi Sport Quattro Laserlight Concept
- Audi OLED Swarm System
- ADB/AFS Penetration Rates, 2010-2025E
- AFS System Architecture of the Reference Design
- Global LED Automotive Lighting Market Size, 2010-2016E
- Geographical Distribution of Global LED Output Value, 2013-2014
- Rankin of Top 30 LED Companies Worldwide by Revenue, 2012-2014
- Operating Margin of Taiwan LED Companies, 2012-2014
- Gross Output Value of China LED Industry, 2013-2014
- Ownership of MOCD in China LED Industry, 2010-2014
- Output Value of LED Epitaxial Chip in China, 2010-2014
- Output Value of LED Packaging in China, 2010-2014
- LED Output Value by Application in China, 2010-2014
- LED Application Structure by Output Value, 2013-2014

- LED Output Value by Application in China, 2014
- Automotive Lighting Market by type, 2015
- LED Penetration, 2007-2015
- Automotive Headlamp Source by technology, 2013-2015
- Automotive Taillamp Source by technology, 2013-2015
- Global Automotive Lighting Market Size, 2010-2018E
- Global Automotive Lighting Market Size by End Market, 2010-2016E
- Ranking of Global Major Automotive Lighting Companies by Revenue, 2013-2015
- Automotive Lighting System Supply Structure of Toyota, 2014
- Automotive Lighting System Supply Structure of Honda, 2014
- Automotive Lighting System Supply Structure of Nissan Renault, 2014
- Automotive Lighting System Supply Structure of GM, 2014
- Automotive Lighting System Supply Structure of Ford, 2014
- Automotive Lighting System Supply Structure of VW, 2014
- Automotive Lighting System Supply Structure of Hyundai, 2014
- Market Share of Major Sedan Lighting Companies in China, 2014
- Top 20 Automotive Light Companies in China by Sales, 2013
- Koito's Client Distribution, 2014
- Major clients of Chinese Automotive Light Companies
- Hella's Milestone, 1899-2014
- Hella's Revenue and EBIT, FY2007-FY2015
- Hella Quarterly Comparison, FY2015
- Hella Gross Profit Margin Bridge, FY2014-FY2015
- Hella's Organizational Structure
- Hella's Revenue by Division, FY2010-FY2015

- Hella's Revenue by Region, FY2007- FY 2012
- Hella's Revenue by Region, FY2013- FY 2015
- Favorable Customer Mix and Regional Exposure of Hella, FY2014
- Global Distribution of Hella's Staff
- Global Layout of Hella, 2007-2013
- Hella Automotive Lighting Revenue Segment by Product, FY2015
- Hella Automotive Electronics Revenue Segment by Product, FY2015
- Hella Aftermarket Revenue Segment by Business, FY2015
- Koito's Revenue and Operating Margin, FY2006- FY 2016
- Assets and Equity of Koito, 2011-2015
- Koito's Revenue by Region, FY2008- FY2013
- Koito's Revenue by Region, FY2013- FY2015
- Koito's Plants in China
- ADB of Koito
- Koito LED Roadmap, 2007-2015
- Major Vehicle Models Supported by Koito
- LED light Sales of Shanghai Koito, 2005-2009
- Shanghai Koito's Revenue and Operating Margin, 2004-2013
- Ichikoh's Revenue and Operating Margin, FY2006- FY 2016
- Ichikoh's Revenue by Region, FY2007- FY2014
- Ichikoh's Distribution in the World
- Ichikoh's Distribution in Japan
- Major Vehicle Models Supported by Ichikoh
- Stanley's Main Products
- Stanley's Revenue and Operating Margin, FY2006- FY 2016



- Stanley's Assets and Liabilities, FY2010- FY 2014
- Stanley's Automotive Lighting Revenue and Operating Margin, FY2006- FY 2015
- Stanley's Revenue by Region, FY2008- FY 2014
- Guangzhou Stanley's Revenue and Operating Margin, 2004-2013
- Valeo's Revenue and Gross Margin, 2005-2014
- Valeo's Revenue by Division, 2009-H1 2015
- Valeo's EBITDA by Division, 2012-2014
- Valeo's Clients by Region, 2007-2014
- Valeo's Automotive Lighting Main Customer
- Varroc's Revenue by Product, FY2013
- Varroc's Revenue by Segment, 2014
- Global Distribution of Technical Centers of Visteon's Automotive Lighting Division
- Global Distribution of Production Bases of Visteon's Automotive Lighting Division
- Major Vehicle Models Supported by Visteon's Automotive Lighting Division
- Global Distribution of Magneti Marelli
- Revenue of Magneti Marelli by Product, 2013
- Revenue and EBIT Margin of Magneti Marelli, 2006-2015
- Automotive Lighting Revenue of Magneti Marelli, 2007-2015
- Automobiles Equipped with Automotive Lighting
- Lights Used by Mercedes-Benz S
- Lights Used by BMW 4 Series
- TYC's Revenue and Operating Margin, 2005-2015
- TYC's Monthly Revenue and Growth Rate, July 2013-July 2015
- Financial Status of TYC's Subsidiary in Mainland China, 2010
- Financial Status of TYC's Subsidiary in Mainland China, 2011

- Financial Status of TYC's Subsidiary in Mainland China, 2012
- Financial Status of TYC's Subsidiary in Mainland China, 2013
- Financial Status of TYC's Subsidiary in Mainland China, 2014
- DEPO's Revenue and Operating Margin, 2006-2015
- DEPO's Monthly Revenue, July 2013-July 2015
- DEPO's Revenue by Region, 2009-2012
- DEPO Global Distribution Network
- Financial Data of DEPO's Subsidiary in Mainland China, 2012
- Revenue and Operating Margin of Ta Yih Industrial, 2004-2015
- Monthly Revenue and Growth Rate of Ta Yih Industrial, July 2013-July 2015
- Distribution of Ta Yih Industrial
- Industrial Products of Ta Yih Industrial
- Clients of Ta Yih Industrial
- Equity Structure of Changzhou Xingyu
- Output of Changzhou Xingyu, 2013-2014
- Revenue and Operating Margin of Changzhou Xingyu, 2007-2015
- Client Structure of Changzhou Xingyu, 2007-2014
- Distribution of Staff Positions of Changzhou Xingyu, 2014
- Major Clients of Jiangsu Tongming
- ZKW's Organizational Structure
- Geographical Distribution of ZKW's Staff, 2014-2015
- SL's Revenue and Operating Margin, 2008-2014
- SL's Revenue by Product, 2010-2014
- Structure of Laster Tech
- Revenue and Gross Margin of Laster Tech, 2008-2015

- Monthly Revenue of Laster Tech, July 2013-July 2015
- Revenue of Laster Tech by Business, 2011-2013
- Products of Laster Tech
- Fiem's Revenue and Profit, FY2011-FY2014
- Revenue Structure of Fiem by Product, FY2014
- Fiem's Manufacturing Unit
- Fiem's Major Clients
- Revenue and Operating Margin of Nichia Chemical, 2003-2014
- Revenue and Operating Margin of Nichia Chemical LED Division, 2004-2014
- Revenue and Operating Margin of Toyoda Gosei, FY2006-FY2015
- Revenue of Toyoda Gosei by Product, FY2006-FY2015
- Revenue of Toyoda Gosei by Region, FY2006-FY2015
- Revenue and Operating Margin of Toyoda Gosei in Asia-Pacific, FY2006-FY2015
- Revenue and Operating Margin of Toyoda Gosei LED Business, FY2008-FY2015
- OSRAM'S Quarterly Revenue and EBITA Margin, Q1 2012-Q1 2015
- Osram's Revenue by Division, 20012-2014
- Osram's Revenue by Division, 20014-2015
- Osram's EBITA by Division, 20012-2014
- Osram's SP Revenue and EBIT, Q3 2013-Q1 2015
- Osram's OS Revenue and EBIT, Q3 2013-Q1 2015
- Osram's Revenue by Region, 20012-2014

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