



Global and China Automotive Lighting Industry Report, 2016

Jun. 2016

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, 2016 focuses on the followings:

- 1, Status quo and trend of headlight design
- 2, Technical analysis on laser/OLED/AFS/ADB/night vision system
- 3, Global and Chinese automotive lighting market size and forecast
- 4, Competitive landscape of global and China automotive lighting industry
- 5, Competitive landscape of global and China automotive LED industry
- 6, Global brake system and EPS manufacturers

In 2015, the global OEM automotive lighting market valued about USD24 billion, while the maintenance and modification markets fetched about USD1.5 billion each. The maintenance market remained stable, but the modification market witnessed gradual decline with the growth of pre-installed xenon lamps.

Adaptive Driving Beam (ADB) must be with LED headlights. Low power consumption, simple design (compared with HID) and dropping prices of LED propel the application of LED headlights quickly as the share may increase from 9% in 2015 to 27% in 2020. At the same time, xenon lamps still occupy a place in the medium and high-end market because of the high brightness, and the share herein will stabilize at around 14%. Especially in China, people are enthusiastic about xenon lamps because they meet their pursuit for fashion and dazzling, so such lamps will still be more popular than LED in Chinese medium and high-end market. Due to high costs, laser headlights are expected to seize the share of only 1% in 2019. The ADB penetration rate will jump from 5% in 2015 to 25% in 2020, the AFS penetration rate will escalate from 10% in 2015 to 23% in 2020, and China will see 30%.

Global automotive lighting market size was USD27 billion in 2015, up 3.8% from a year earlier, and is expected to grow by 1.9% year on year to USD27.5 billion in 2016. The reasons for the slowdown are as follows:

- Slowdown in both Chinese and American markets;
- Drastic devaluation of the euro and the yen;
- Continued decline in prices of LED dies and LED lamps;
- Falling prices of oil and plexiglass (a raw material of headlights).

Revenue of Major Automotive Lighting Manufacturers in the World, 2013-2016

USD mln

	2013	2014	2015	2016E
HELLA	3,350	3,555	3,490	3,780
KOITO	5,940	6,380	6,608	6,700
ICHIKOH	838	850	826	850
STANLEY	2,071	2,002	2,308	2,350
VALEO	2,008	2,252	2,390	2,500
Osram	510	580	550	590
Varroc	520	748	750	750
Automotive Lighting(Magneti Marelli)	3,080	3,360	3,520	3,910
TYC	556	618	510	500
DEPO	460	484	490	560
Ta Yih Industrial	142	163	191	190
Changzhou Xingyu	264	320	350	425
ZKW	756	780	810	880
SL	910	990	1,030	1,050
Mobis	550	490	450	410

1 Headlight Design

- 1.1 Benz's New-generation LED Headlight
- 1.2 Cadillac's CTS Headlight
- 1.3 Audi's and BMW's Headlight
- 1.4 Honda's and Lexus' Headlight

2 Laser/OLED/AFS/ADB/Night Vision System

- 2.1 BMW's Laser Headlight
- 2.2 Audi's Sport Quattro Laser Headlight
- 2.3 Audi's R8 LMX Laser Headlight
- 2.4 OLED Taillight
- 2.5 Audi's OLED Taillight
- 2.6 AFS/ADB Penetration Rate in 2015-2020
- 2.7 Introduction to AFS and System Structure
- 2.8 AFS ECU
- 2.9 AFS Working Principle
- 2.10 OSRAM's LED PIXELATED AFS
- 2.11 HBA (high beam assist) / Adaptive Driving Beam (ADB)
- 2.12 HBA (high beam assist) Must Be with LED Headlights
- 2.13 HBA (high beam assist) Image Sensor
- 2.14 Gentex Smart Beam Overview
- 2.15 HW-Architecture of SmartBeam
- 2.16 Night Vision Overview
- 2.17 FLIR PathfindIR and Lens
- 2.18 Night Vision Static
- 2.19 BMW's Night Vision
- 2.20 Night Vision Trend
- 2.21 FIR Camera Market Volume and ASP in 2012-2020E
- 2.22 Introduction to FLIR

3. Automotive Lighting Market and Industry

- 3.1 Global Automotive Lighting Market Size, 2010-2020E
- 3.2 Global Headlight Shipment by Technology, 2015-2020E
- 3.3 Revenue of Major Automotive Lighting Manufacturers in the World, 2013-2016
- 3.4 Market Share of Global Major Headlight Manufacturers (by Shipment), 2015
- 3.5 Automotive Lighting System Supply Structure of Toyota, 2015
- 3.6 Automotive Lighting System Supply Structure of Honda, 2015
- 3.7 Automotive Lighting System Supply Structure of Nissan Renault, 2014
- 3.8 Automotive Lighting System Supply Structure of GM, 2015
- 3.9 Automotive Lighting System Supply Structure of Ford, 2015
- 3.10 Automotive Lighting System Supply Structure of VW, 2015
- 3.11 Automotive Lighting System Supply Structure of Hyundai, 2015
- 3.12 Chinese Automotive Lighting Market Size, 2010-2020E
- 3.13 Market Share of Chinese Major Headlight Manufacturers
- 3.14 Supply Relationship between Chinese Headlight Manufacturers and Car Makers

4 Automotive LED Industry

- 4.1 Global LED Applications, 2014-2020E

- 4.2 Ranking of Global Top 10 LED Manufacturers by Revenue, 2013-2015
- 4.3 Market Share of Automotive LED Suppliers, 2015
- 4.4 Nichia's Revenue and Operating Margin, 2003-2015
- 4.5 Profile of Osram
- 4.6 Osram Targets High-end Market and Aftermarket
- 4.7 LED Revenue of Toyoda Gosei, FY2008-FY2016
- 4.8 Lumileds

5. Automotive Lighting Companies

- 5.1 Koito
- 5.2 Hella
- 5.3 Automotive Lighting
- 5.4 Stanley
- 5.5 ZKW
- 5.6 Valeo
- 5.7 Ichikoh
- 5.8 South Korea SL
- 5.9 Varroc
- 5.10 TYC
- 5.11 DEPO
- 5.12 Ta Yih Industrial
- 5.13 Changzhou Xingyu Automotive Lighting Systems
- 5.14 Jiangsu Tongming
- 5.15 Liaowang Automotive Lamp
- 5.16 Laster Tech

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