



**Global and China Automotive Lens Industry
Report, 2016-2020**

Sep. 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

With the high-speed growth of the global ADAS market, the demand for automotive cameras jumped radically with the market size growing at a compound annual rate of 31.3% during 2011-2015. Automotive lens means optical lens mounted on vehicles in order to implement various functions, consisting mainly of endoscope lens, rear view lens, front view lens, side view lens, surround view lens, etc.. The market of automotive lens which is a major part of automotive cameras is growing rapidly.

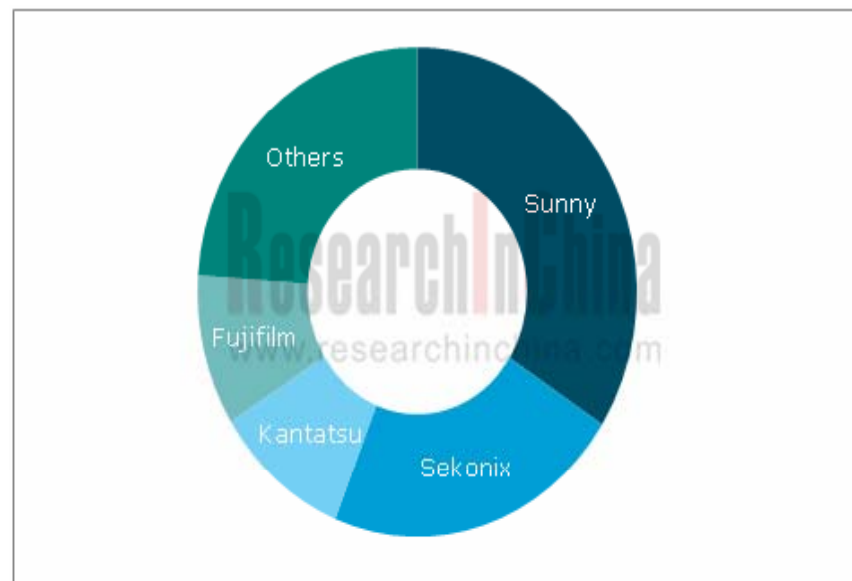
In 2015, the global shipments of OEM automotive lens approximated 48.5 million pieces, embracing 11.1 million pieces of front view automotive lens and 37.4 million pieces of rear view and surround view lens. In the next few years, the global shipment of OEM automotive lens will benefit from ADAS-related policies, maintain quick growth and reach 136.2 million pieces by 2020.

China's automotive lens OEM market size reached 10 million pieces in 2015, accounting for 20.6% of the global market. Wherein, there were 1.23 million pieces of front view automotive lens and 8.77 million pieces of rear view and surround view lens. "Made in China 2025", "Internet +" development strategy and other favorable policies proposed by China in 2015 will stimulate the demand for automotive lens. By 2020, China's automotive lens OEM market size will report 38.65 million pieces.

At present, the companies involved in the automotive lens industry are mostly traditional camera lens vendors, including Sekonix, Fujifilm, Sunny Optical, Largan Precision, GSEO, Union Optech, Ability Opto-Electronics Technology and so on.

Sunny Optical is the world's largest supplier of automotive lenses, serving Mobileye, Gentex, TRW, Valeo, Bosch, Continental, Delphi, Magna, among others. In 2015, Sunny Optical realized the shipment of 16.516 million pieces and enjoyed the market share of 34.1%.

Competitive Landscape of Global Automotive Lens Market (by Company), 2015



Source: ResearchInChina

Policies Bolstering the Development of Autonomous Driving Worldwide

	Policies
USA	ITS Strategic Plan (2015-2019) clarifies intelligent and network-connected development goals, and plans to invest USD4 billion in supporting research on telematics and autonomous driving in the next decade
EU	ITS Development Action Plan and The EU's Future Transport Research and Innovation Program stipulate vehicle-road synergy, active safety, road safety systems and traffic informatization in the field of traffic safety.
Japan	The Cabinet Office, Government of Japan proposes Declaration on Creation of the World's Most Advanced IT Country and promoted the constitution of the autonomous driving system R & D program
China	In September 2016, the state departments jointly issued Implementation Plan of Promoting the "Internet +" Convenient Transport and the Development of Intelligent Transport to develop and prompt the use of intelligent automotive facilities and autonomous vehicles as an important developmental task of upgrading equipment and tool automation.

Source: ResearchInChina

In the next few years, the global and Chinese automotive camera market will continue to grow thanks to the followings:

1, Binocular Cameras Are Expected to be the Mainstream and Drive the Demand for Automotive Lens

Compared with monocular cameras, binocular cameras are featured with high resolution, unlimited recognition rate, no need of sample database maintenance and so forth. Currently, binocular cameras have become the R & D focus of Japanese, German and other European and American vendors, and will replace monocular cameras to be the market mainstream in the future, which means that the demand for automotive lens will grow.

2, ADAS-related Policies Boost the Demand for Automotive Lens to Grow

In recent years, some countries and regions have issued a series of policies to prompt the popularity of ADAS. The United States requires all cars to install at least one rear view camera from 2018 onwards. The European New Car Assessment Program (NCAP) stipulates that only the AEB-installed cars whose active safety systems occupy 20% instead of 10% can be rated as 5 stars since 2014. Japan commands that all cars must install automatic emergency braking systems from 2016 onwards.

3, Favorable Autonomous Driving Policies Drive the Development of Automotive Lens

Currently, the US, EU, Japan, China and other countries and regions have enacted policies to promote the development of autonomous driving, which will benefit smart car-use cameras. Therefore, automotive lens will see rapid development as a key component of automotive cameras.

The report highlights the followings:

- ➔ Size, segments, competitive pattern and development trend of global automotive lens OEM market;
- ➔ Size and segments of Chinese automotive lens OEM market;
- ➔ Analysis on automotive lens industry chain, including introduction to automotive camera industry, ADAS market and impact of related sectors on automotive lens industry;
- ➔ Operation, automotive lens business and the like of eight Chinese and five foreign automotive lens companies.

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