Global and China Automotive Instrument Cluster and Head-up Display (HUD) Industry Report, 2016-2020

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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.

Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080
Phone: +86 10 82600828 ● Fax: +86 10 82601570 ● www.researchinchina.com ● report@researchinchina.com

Abstract

Global and China Automotive Instrument Cluster and Head-up Display (HUD) Industry Report, 2016-2020 highlights the following:
1. Global and China automobile market
2. Instrument cluster and HUD market and industry
3. Development trends of instrument cluster and HUD
4. DLP, laser scanning and AR HUDs
5. Key vendors

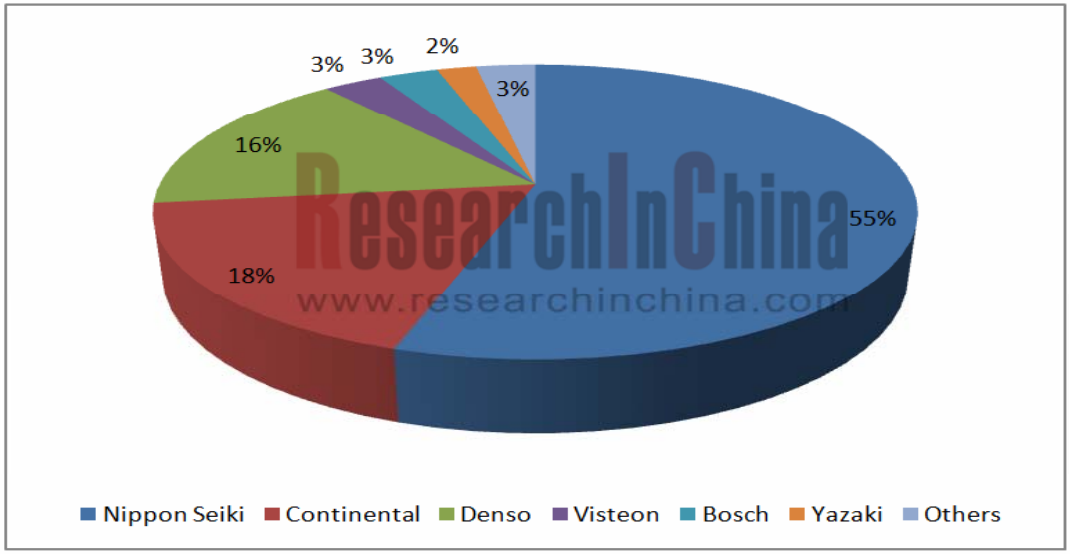
HUD (Head-up Display) falls into windshield type (W-type) and combined type (C-type). It was initially mounted on GM Corvette in 2001, and then the first color HUD was launched by BMW in 2004. Global OEM HUD market size attained USD560 million in 2016, surging by 33% from a year earlier, and is predicted to leap to USD1,780 million in 2020. Market size and shipments of W-type were roughly USD530 million and 2 million sets respectively in 2016, and will expectedly move up to USD1,715 million and about 7 million sets in 2020; C-type saw market size of around USD30 million and shipments of 600,000 sets in 2016, and the figures are estimated to climb to USD65 million and 1.7 million sets respectively in 2020.

Nippon Seiki under Honda seizes a market share of over 50%. BMW, GM and Audi are the three major clients of Nippon Seiki, and their models including BMW 5 Series, 7 Series, X Series, Audi Q7 and GM Cadillac and Buick all carry Nippon Seiki's HUDs. The company plans a capacity of 3 million units in 2020, most of which will be W-type. It now has 4 production bases in Japan, North America and the UK, and is building a new one in Miyoshi, Hiroshima Prefecture which is scheduled to come into production next year. Continental's main clients are Mercedes-Benz, Audi and BMW, and its HUDs find application in Mercedes-Benz C Class, Audi A6 and A7 and BMW 3 Series. In January 2017, Continental and the U.S.-based Digilens reached a strategic cooperation agreement for development of AR-HUD. Denso primarily supports Toyota and Hyundai; Visteon is a supplier of PSA; BMW Mini bears Bosch's HUD.

In OEM market, C-type will expectedly see a declining market share due to poor user experience, and even Chinese automakers use few HUDs of such type, for example, Geely equips its Borui models with W-type. AR-HUD is the general direction of OEM. To achieve AR (augmented reality) of the true sense, DLP (digital light processing) projection technology is indispensable. AR-HUD will come out in 2018 and be the mainstream in 2021. However, for digital micromirror device (DMD), the core component of DLP projector, and related technologies are monopolized by Texas Instruments, coupled with complicated optical path and much higher price of DMD than TFT-LCD, DLP's costs will seldom drop despite maturity of the technology for quite a few years. Therefore, laser scanning type HUD is likely to capture the market in the future, hopefully taking a share of 10% in OEM market in 2021, 25-30% in 2025.

As for aftermarket (AM), reflection-type TFT-LCD is dominant as DLP with more complicated optical path and higher internal temperature is unacceptable to AM manufacturers whose technology capabilities are relatively weak. With marked improvement in brightness of OLED, transparent OLED will be the development orientation of AM, but OLED for HUD will not appear in a short time because of little use in AM and monopoly of LG and Samsung in technology and capacity.

Market Share of Major OEM HUD Vendors Worldwide, 2016



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