



Global and China Automotive Lighting Industry Report, 2016-2020

June 2017

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, 2016-2020 covers the following:

1. Global and Chinese automotive lighting market analysis and forecast;
2. Global and Chinese automotive lighting industry analysis and forecast;
3. Status quo and trends of automotive lighting technology
4. 15 major automotive lighting vendors

Global automotive lighting market was worth about USD27.5 billion in 2016, a year-on-year growth of 9.6%, and is predicted to reach USD30.2 billion in 2017, a 9.8% rise from a year ago. Such a rapid growth is primarily attributed to the expedited market entry of LED headlamps, particularly in the Chinese market, and a blowout in additional functions like ADB (Adaptive Driving Beam) and AFS (Adaptive Front-Lighting System). ADB works only on LED headlamp whose small size is conducive to a more flexible design of vehicle appearance and lower energy consumption. Moreover, continued price decline allows LED to enjoy a higher price/performance ratio than HID, boosting the share of LED headlamp which is projected to jump from 7% in 2015 to 21% in 2020 and up to 30% in 2025.

Koito, the world's No. 1 automotive lighting company, recorded a faster growth rate (as high as 14.4%) in 2016. The company's revenue in China was RMB13.5 billion in FY2017, representing a 17.4% rise over the previous year, while operating profit, dragged down by yen appreciation, increased by just 4.1% to RMB820 million. Having achieved double-digit growth in China for several years in a row, Koito almost monopolizes the Chinese LED headlamp market, whatever JV-brand market or local-brand market. Valeo, after taking over the control of Ichikoh Industries via a more than 50% stake acquisition, reshaped the latter and boosted its performance with the revenue for FY2017 climbing by 24% and operating profit nearly doubling. Despite its surpassing over Hella and Automotive Lighting to be the world's second largest automotive lighting company, Valeo still earned less than half what Koito makes. With the number of employees going up from 5,700 to 7,500, ZKW gave an excellent performance, snatching many orders from Automotive Lighting and raising its revenue by 25%. Dalian plant performed exceptionally well.

Revenue of Global Major Automotive lighting Companies, 2013-2016

Unit: USD mln	2013	2014	2015	2016
Koito	5,940	6,380	6,760	7,740
Automotive Lighting (Magneti Marelli)	3,080	3,360	3,510	3,600
Hella	3,350	3,255	3,090	3,190
Stanley	2,071	2,260	2,606	2,840
Valeo	2,008	2,252	2,390	2,520
SL	880	820	850	960
ICHIKOH	838	850	839	1,040
ZKW	756	780	853	1,056
VARROC	520	750	750	850
TYC Brother Industrial Co.	556	620	510	506
Depo	460	484	490	492
Xingyu	264	320	350	504
Mobis	550	490	450	410

Automotive lighting industry is highly concentrated with top5 players holding a combined 75% market share which is still on the rise, largely because of higher threshold for small companies as the prices are higher and the systems become increasingly complicated.

The Chinese automotive lighting market was USD6.5 billion in 2016, and is projected to reach USD7.5 billion in 2017 and USD9.6 billion in 2020. Car sales saw the highest growth rate in 2016 in China; both JV and local Chinese brands underline car appearance and LED can help add flexibility to appearance design and enhance the sense of technology, more LED headlamps are used. However, most of orders went to Koito.

1. Headlamp Design

Headlamp Manufacturing Process
 Tail Lamp Manufacturing Process
 Headlamp Design
 New-generation LED Headlamp of Mercedes-Benz
 CTS Headlamp Design of Cadillac
 Headlamp Design of Audi and BMW
 Headlamp Design of Honda and LEXUS

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

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 Laser Headlamp of Audi R8 LMX
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 Introduction to FLIR

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Profile of Hella	Application of Valeo's Beamic Premium
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Development Course of Hella's Headlamp	Valeo's LED Headlamp
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Hella Headlamps Modules	Valeo's Automotive Lighting Companies in China
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Global Presence of DEPO

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DEPO's Base in Mainland China

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Main Clients of Ta Yih Industrial

Revenue and Operating Margin of Changzhou Xingyu Automotive Lighting Systems, 2007-2017

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Jiangsu Tongming Vehicle Lamps

Nanning Liaowang Automobile Lamp

Laster Tech

Global Presence of Laster Tech

Revenue and Gross Margin of Laster Tech, 2008-2016

Car Models with Laster Tech's Products

Main Clients of Laster Tech

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