

# Global and China Cluster and Center Console Industry Report, 2019-2020

Dec. 2019

## 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.

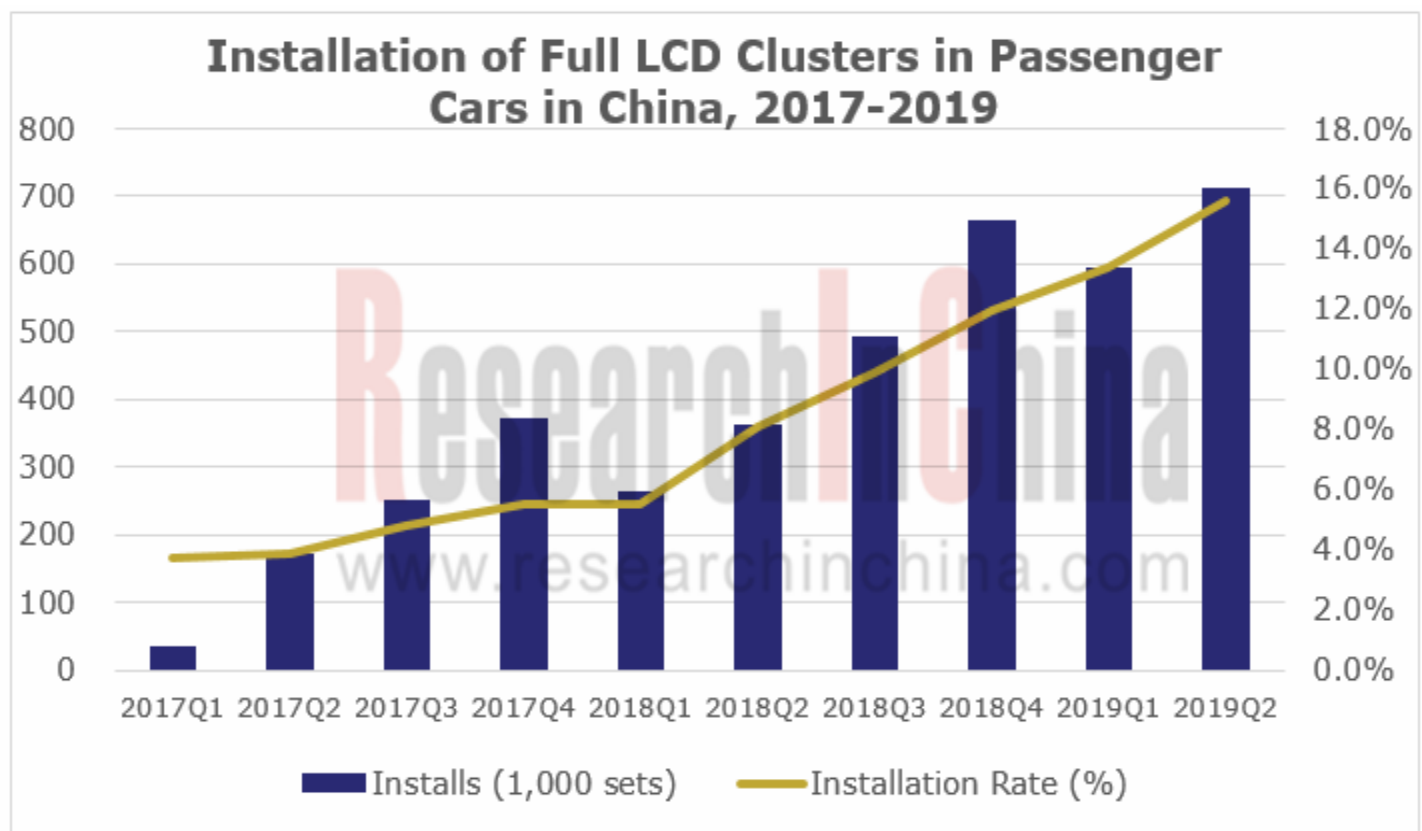
## Abstract

As automotive electronics technology advances, cluster and center console are evolving. In an era of intelligent connected vehicles, full LCD clusters will be mainstream automotive instrument products in future. They tend to become available to entry-level models, not just being found in high-class vehicles.

In the first half of 2019, 1,307,900 sets of full LCD clusters were installed in passenger cars in China, a like-on-like spurt of 108.5%, with installation rate jumping from 5.2% in early 2018 to 15.0% in June 2019. It is predicted that installation rate of full LCD clusters will be 35% in 2025.

In recent years, 3D clusters have come to the fore in automotive instrument deployments of players, including leading cockpit electronics suppliers like Continental and Visteon. The Natural 3D Lightfield Instrument Cluster, co-developed by Continental and a Silicon Valley company Leia Inc., will be spawned in 2022. Visteon has developed two 3D clusters: one is 3D technology for high-end models; the other is a multi-layer 3D technology, more applicable to low- and mid-end models. New PEUGEOT 208 (2019) carries Visteon's new 3D clusters which offer real, visual 3D content and allow for higher level of interaction.

Personalized, highly customized profiled clusters (including curved ones) are a megatrend for automotive instrument cluster design. Examples include a high-tech, sleek-framed 16.8-inch curved dashboard mounted on the latest Porsche Taycan 2019 and displaying clear information, and a high performance custom-made curved dashboard rolled out by MTA, an Italian electronics supplier, in December 2019.



Source: ResearchInChina

Intelligence tendency will fuel enthusiasm for dual or triple siamesed display design. Following Mercedes-Benz's launch of dual siamesed display design that provides luxury experience for users, more automakers choose to employ such high-tech, more practical center console solutions in their models like: full range of Hongqi HS5 2019 with standard dual 12.3-inch siamesed displays; latest Changan CS75 PLUS packing an immersive dual 12.3-inch siamesed display; ENOVATE ME7 with a 12.3-inch LCD dashboard, a 15.6-inch center console and a 12.3-inch entertainment display at the copilot's seat; and GAC NE Aion LX featuring dual curved screen design.

World-renowned automotive display suppliers like JDI, LGD, BOE and AU Optronics all invest more in research and development of display technology in their efforts to commercialize and spawn automotive OLED displays. At the same time, the breakthroughs in Mini Led and Micro LED technologies that may become the next-generation automotive display technologies, will make more display options a possibility.

Global and China Cluster & Center Console Industry Report, 2019-2020 highlights the following:

- ◆ Global and China cluster market (size, configuration, full LCD cluster installation, automakers' deployments, and development trends);
- ◆ Global and China center console market (size, installation, and development trends);
- ◆ Global and China display market (size, shipments, enterprise pattern and development trends);
- ◆ 16 global and Chinese suppliers of cluster & center consoles solutions (operation, cluster & center console deployments, development plan, etc.);
- ◆ 11 global and Chinese display suppliers (operation, automotive display deployments, new products, development trends, etc.).

### 1 Overview of Cluster and Display

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##### 1.1.4 Development Course

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