



# Global and China Automotive Lighting Industry Report, 2012

Oct. 2012

## 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 the China Association of Automobile Manufacturers, National Bureau of Statistics of China and China Customs etc.

## Abstract

**Global and China Automotive Lighting Industry Report, 2012**  
resolved around the followings:

- ✓ Global and China automotive market
- ✓ Automotive industry in China and beyond
- ✓ Automotive lighting and LED industry
- ✓ Global and China automotive lighting industry
- ✓ 16 automotive lighting companies

Automotive lighting market is relatively mature, and LED headlamp used to be the hot topic of automotive lighting area. Despite the plummeting price of LED in 2011, LED headlamp sees a very limited decline in costs and is only mounted on a few high-end cars. This trend is likely to continue in the 3-5 years to come.

**Revenue of Key Automotive Lighting Companies Worldwide, 2010-2012**

Unit: US\$M	2010	2011	2012E
HELLA	3,685	4,251	4,782
KOITO	4,097	4,608	5,126
ICHIKOH	925	1,098	1,175
STANLEY	1,966	2,124	2,554
VALEO	1,889	1,902	1,890
Visteon (Varroc)	552	601	588
Automotive Lighting(Magneti Marelli)	2,103	2,409	2,528
TYC	265	285	298
DEPO	304	335	336
Tayih-Ind	122	142	170
Changzhou Xingyu	129	170	208
ZKW	378	547	608
SL	117	141	160

Sorece: RIC<Global and China Automotive Lighting Industry Report, 2012>

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In the automotive lighting area in 2012, nothing was more eye-catching than Indian Varroc's acquisition of Visteon's automotive lighting business with USD92 million in cash. In 2011, Visteon derived revenue of USD601 million from its automotive lighting business. Founded in 1990, Varroc is a provider of plastic injection parts, and has Bajaj and Videocon as its major customers. With 20 plants in India, Varroc operates Engineering Division and Polymer Division, with the former contributing 65% to its revenue. The revenue of Varroc hit USD615 million in 2011 and is expected to reach USD1,208 million in 2012.

Visteon's withdrawal from automotive lighting field marked that the U.S. based players have retreated from the battleground, and the market is mostly occupied by Japanese manufacturers. For instance, Koito, the world's largest automotive lighting provider, is principally bolstered by European and American clients.

Specifically, Shanghai Koito Automotive Lamp Co., Ltd. derives 27% of its revenue from Shanghai GM, 19% from Shanghai VW, 7% from FAW VW and only 15% from Japanese clients, while European manufacturers still fail to be recognized by American customers. The robust demand for luxury cars in Chinese market booms the German automotive industry and benefits the related OEM enterprises, which explains why Hella still attains rapid growth and exempts from the impact of euro-zone debt crisis.

In July 2011, Taiwan-based DEPO, focusing on export market, paid NTD725 million to reach an out-of-court settlement of antitrust charges. In January 2012, TYC, also aiming at export market, spent NTD300 million on out-of-court settlement of antitrust charges. These should serve as warnings for those who plan to tap into the U.S. automotive lighting aftermarket.

### **1 Global Automotive Market and Industry**

- 1.1 Global Automotive Market
- 1.2 Global Automotive Industry

### **2 China Automotive Market and Industry**

- 2.1 Overview of China Automotive Market
- 2.2 Recent Developments of China Automotive Market
- 2.3 Performance of Foreign-funded Automotive Brands in China, Jan.-Sep. 2012
- 2.4 China Passenger Car Market
- 2.5 China Commercial Vehicle Market
- 2.6 China Automotive Industry

### **3 Automotive Lighting**

- 3.1 Profile of Automotive Lighting
- 3.2 Profile of Automotive Lighting Source
- 3.3 Advantages of LED Lighting Source
- 3.4 Current Status of Automotive LED Headlamp
- 3.5 LED Headlamp
  - 3.5.1 Reflection
  - 3.5.2 Projection
  - 3.5.3 Lens-imaging, Total-reflection and DOE-lens
- 3.6 LED Thermal Management
- 3.7 LED Automotive Lighting Market
- 3.8 HID Xeon Lamp
  - 3.8.1 Profile of HID Xeon Lamp
  - 3.8.2 HID Xeon Lamp Market

### **4 LED Industry**

- 4.1 LED Industry by Region
- 4.2 Ranking of Global Top 27 LED Manufacturers by Revenue, 2010-2012
- 4.3 LED Industry in Taiwan
  - 4.3.1 LED Industrial Pattern in Taiwan
  - 4.3.2 Ranking of LED Epitaxy Producers in Taiwan, 2010
  - 4.3.3 Ranking of LED Packaging Enterprises in Taiwan
- 4.4 LED Industry in Chinese Mainland

### **5 Automotive Lighting Industry and Market**

- 5.1 Market Size of OEM Automotive Lighting
- 5.2 Global Automotive Lighting Industry
- 5.3 Global Automotive Lighting Support System
- 5.4 China Automotive Lighting Industry
- 5.5 Supply Relationship between OEM Automotive Lighting Vendors and Automakers

### **6 Automotive Lighting Vendors**

- 6.1 Hella
  - 6.1.1 Changchun Hella Automotive Lighting Limited
- 6.2 Koito
  - 6.2.1 Shanghai Koito Automotive Lamp
  - 6.2.2 Guangzhou Koito Automotive Lamp
  - 6.2.3 Fuzhou Koito Tayih Automotive Lamp

- 6.3 Ichikoh
- 6.4 Stanley
  - 6.4.1 Guangzhou Stanley Electric
  - 6.4.2 Tianjin Stanley Electric
- 6.5 Valeo
- 6.6 Visteon
  - 6.6.1 YFV
  - 6.6.2 Visteon TYC Auto Lamps
- 6.7 Automotive Lighting (Magneti Marelli)
- 6.8 TYC
- 6.9 DEPO
- 6.10 Tayih-Ind
- 6.11 Changzhou Xingyu
- 6.12 Jiangsu Tongming Auto Lamp
- 6.13 ZWK
- 6.14 Nanning Liaowang Auto Lamp
- 6.15 SL Corporation
- 6.16 Zhejiang Tianchong Auto Lamp

### **7 Automotive Lighting Source Vendors**

- 7.1 Lumileds
- 7.2 Cree
- 7.3 Toyota Gosei
- 7.4 Nichia
- 7.5 OSRAM Opto

- Sales Volume of Global Leading Automotive Brands, 2010-2011
- Auto Sales Volume in China, 2001-2012
- Auto Sales Volume in China, 2001-Jul. 2012
- Sales Volume of Sedans in China, Jan. 2009–Jul. 2012
- Sales Volume of SUVs in China, Jan. 2009–Jul. 2012
- Market Share of Sedans in China by Country, Jan. 2009–Jul. 2012
- Market Share of Sedans in China by Size, Jan. 2009–Jul. 2012
- Market Share of Sedans in China by Price, Jan. 2009–Jul. 2012
- Market Share of Sedans in China by Displacement, Jan. 2009–Jul. 2012
- Sales Volume of Light Trucks in China, Jan. 2009–Jul. 2012
- Sales Volume of Mini Trucks in China, Jan. 2009–Jul. 2012
- Sales Volume of Minibuses in China, Jan. 2009–Jul. 2012
- Sales Volume of Major Sedan Manufacturers, Jan.-Jul. 2012
- Monthly Operating Margin of Key Automakers in China, Jan. 2009-Jun. 2012
- LED Projection-Type Design of Koito
- Optical Imaging System of LED Lens
- All-Reflection Imaging of Lens
- DOE Lens
- Lighting Source Cost and Illuminance for Five Auto Models, 2007-2014
- LED Auto Lighting Market Size, 2008-2015
- Lighting Source Distribution of Sedan Headlamp Worldwide, 2009-2014
- Lighting Source Distribution of Sedan Headlamp in China, 2009-2014
- Output Value of LED Industry by Region, 2010-2012
- Output Value of LED Industry by Region, 2012
- Shipment of LED Epitaxy in Taiwan by Color, 2009

- Shipment of LED Epitaxy in Taiwan by Color, 2011
- Shipment of LED Packaging in Taiwan by Technology, 2009
- Shipment of LED Packaging in Taiwan by Technology, 2011
- Relationship Diagram of LED Enterprises in Taiwan
- LED Industry Scale in Taiwan, 2009-2014
- Revenue and Growth Rate of Epitaxy Industry in Taiwan, 2009-2014
- Quarterly Revenue and Growth Rate of Epitaxy Industry in Taiwan, Q4 2010-Q2 2012
- Revenue and Growth Rate of LED Packaging and Module Industry in Taiwan, 2009-2014
- Revenue and Growth Rate of LED Packaging and Module Industry in Taiwan, Q4 2010-Q2 2012
- Ranking of LED Epitaxy Enterprises in Taiwan by Revenue, 2009-2011
- Ranking of LED Epitaxy Enterprises in Taiwan by Operating Margin, 2009-2011
- Ranking of LED Packaging Companies in Taiwan by Revenue, 2009-2011
- Revenue of Major LED Manufacturers in China, 2010-2012
- OE Automotive Lighting Market Size Worldwide, 2007-2012
- Revenue of Key Automotive Lighting Manufacturers Worldwide, 2010-2012
- Supply Ratio of Toyota's Leading Auto Lighting System Suppliers, 2011
- Supply Ratio of Honda's Leading Auto Lighting System Suppliers, 2011
- Supply Ratio of Renault's Leading Auto Lighting System Suppliers, 2011
- Supply Ratio of GM's Leading Auto Lighting System Suppliers, 2011
- Supply Ratio of Ford's Leading Auto Lighting System Suppliers, 2011
- Supply Ratio of VW's Leading Auto Lighting System Suppliers, 2011
- Supply Ratio of Hyundai's Leading Auto Lighting System Suppliers, 2011
- Market Share of Major Sedan Lighting Manufacturers in China, 2008-2012
- Top 10 Automotive Lightings in China by Sales, 2009-2012
- Customer Distribution of Koito Manufacturing Co., Ltd., 2011

- Major Customers of Automotive Lighting Manufacturers in China
- Revenue and EBIT of Hella, FY2007-FY2013
- Revenue and Workforce of Hella, FY2004-FY2012
- Revenue of Hella by Division, FY2010-FY2012
- Revenue of Hella by Region, FY2007-FY2012
- Revenue of Changchun Hella Automotive Lighting Limited, 2004-2011
- Revenue and Operating Margin of Koito, FY2003-FY2013
- Revenue of Koito by Division, FY2003-FY2012
- Revenue of Koito by Region, FY2008-FY2012
- Major Supporting Auto Models of Shanghai Koito Automotive Lamp
- Sales of LED Automotive Lights of Shanghai Koito Automotive Lamp, 2005-2009
- Revenue and Operating Margin of Shanghai Koito Automotive Lamp, 2004-2012
- Revenue and Operating Margin of Ichikoh, FY2004-FY2013
- Revenue of Ichikoh by Region, FY2007-FY2012
- Offices of Ichikoh Worldwide
- Offices of Ichikoh in Japan
- Major Supporting Auto Models of Ichikoh
- Revenue and Operating Margin of Stanley, FY2004-FY2013
- Revenue and Operating Margin of Stanley's Auto Lighting Division, FY2005-FY2013
- Revenue of Stanley by Region, FY2008-FY2012
- Revenue and Operating Margin of Guangzhou Stanley, 2004-2012
- Revenue and Gross Margin of Valeo, 2005-2012
- Revenue of Valeo by Division, 2009-H1 2012
- Customers of Valeo by Region, 2007-H1 2012



- Revenue of Visteon by Region, 2009-2010
- Revenue of Visteon by Product, 2010
- Revenue of Visteon by Customer, 2010
- Revenue of Visteon by Product, H1 2011
- Revenue of Visteon by Region, H1 2011
- Revenue of Visteon by Customer, H1 2011
- Revenue of Visteon's Interior Division by Region
- Revenue of Visteon's Electronic Division by Region, H1 2011
- Revenue of Visteon's Electronic Division by Customer, H1 2011
- Revenue of Visteon's Auto Lighting Division, 2008-2010
- Revenue of Visteon's Auto Lighting Division by Customer, 2008-2010
- Revenue of Visteon's Auto Lighting Division by Region, 2008-2010
- Global Presence of Technical Centers of Visteon's Auto Lighting Division
- Global Presence of Production Bases of Visteon's Auto Lighting Division
- Major Applicable Auto Models of Visteon's Auto Lighting Division
- Distribution of YFV in China
- Revenue, Gross Profit and Net Income of YFV, 208-2010
- Revenue of YFV by Customer, 2010
- Revenue of YFV by Customer, 2011
- Revenue of YFV by Product, 2010
- Revenue and Operating Margin of Magneti Marelli, 2006-2012
- Revenue of Magneti Marelli by Division, 2011
- Revenue of Magneti Marelli by Region, 2011
- Revenue and Operating Margin of TYC, 2002-2012
- Monthly Revenue and Growth Rate of TYC, Aug. 2010-Aug. 2012

- Financial Position of TYC's Subsidiaries in China, 2010
- Financial Position of TYC's Subsidiaries in China, 2011
- Revenue and Operating Margin of DEPO, 2004-2012
- Monthly Revenue and Growth Rate of DEPO, Aug. 2010-Aug. 2012
- Revenue and Operating Margin of Tayih-Ind, 2003-2012
- Monthly Revenue and Growth Rate of Tayih-Ind, Aug. 2010-Aug. 2012
- Enterprise Layout of Tayih-Ind Group
- Products of Tayih-Ind
- Customers of Tayih-Ind
- Equity Structure of Changzhou Xingyu
- Revenue and Operating Margin of Changzhou Xingyu, 2007-2012
- Sales Volume of Changzhou Xingyu by Product, 2007-H1 2010
- Sales of Changzhou Xingyu by Product, 2007-H1 2010
- Customer Structure of Changzhou Xingyu, 2007-H1 2012
- Major Customers of Jiangsu Tongming Auto Lamp
- Revenue and Operating Margin of SL Corporation, 2006-2012
- Revenue of SL Corporation by Product, 2008-2012
- Revenue of Lumileds by Business, 2010
- Revenue of Lumileds by Application, 2010
- Revenue of Lumileds by Region, 2010
- Revenue of Lumileds by Business in Recent 12 Months, by End of Mar. 2012
- Revenue of Lumileds by Region in Recent 12 Months, by End of Mar. 2012
- Revenue of Lumileds by Application, 2011
- Revenue and Operating Margin of Cree, FY2004-FY2012
- Global Presence of Cree

- Cree's Revenue by Region, FY2009-FY2011
- Revenue and Operating Margin of Toyota Gosei's LED Business, FY2008-FY2013
- Revenue and Operating Margin of Nichia, FY2003-FY2012
- Revenue and Operating Margin of LED Division of Nichia, 2004-2012

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