



Global and China Automotive Lighting Industry Report, 2019-2025

May 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

Global automotive lighting market was worth about \$32.8 billion with a year-on-year increase of 8.6% in 2018, and the figure is predicted to reach \$57.0 billion in 2025 as demand for intelligent lamps, especially automotive LED lamps picks up. The penetration of automotive LED headlamps stood at 23% in 2018, and is expected to hit around 60% in 2025, thank to declining cost and better performance of such lamps.

As automobiles are growing smart, intelligent automotive lamps become a megatrend first in the form of ADB (Adaptive Driving Beam) and AFS (Adaptive Front-Lighting System). Wherein, AFS installation rate has sustained steady growth over the years, up from 10.0% in 2015 to 16.8% in 2018, a figure expected to be a whopping 30% or so in 2025. Also, digital intelligent automotive lamps come to the front, being currently available to the high-class vehicle models. Examples include Digital Light Mercedes-Benz launched in 2018, Audi matrix LED intelligent headlight, and WEY LED intelligent pixel headlamp rolled out in 2019, all of which render digital technology to project light for interactions between pedestrians and vehicles, between vehicles and vehicles.

In China, the automotive lighting market will become ever larger with its size showing a CAGR of roughly 9% between 2019 and 2025, because LED with a low penetration in the market still has a rosy prospect and passenger car sales will continue to rise as a whole in the country.

Global automotive lighting market are now almost monopolized by giants like France's Valeo, Italy's Magneti Marelli, Germany-based Hella and Japanese companies Koito and Stanley, which together command over 70% of the global market. Among them, Koito boasts a virtually 25% market share. These big names have a customer base covering all global automakers, and are expanding their regional markets. The oligarchic pattern will hardly change in the near future.

In the Chinese automotive lighting market, joint ventures like Shanghai Koito Automotive Lamp Co., Ltd., Guangzhou Stanley Electric Co., Ltd., Changchun Hella Faway Automotive Lighting Co., Ltd. and Valeo Lighting Hubei Technology Center Co., Ltd. are the main players, accounting for a collective 70% of the highly-concentrated market. Local manufacturers just offer low-tech products such as tail lamps and small lights, with low market shares. The bellwether Changzhou Xingyu Automotive Lighting System Co, Ltd. takes a mere 6% share, but the company is likely to edge into automakers' supplier systems as it increased R&D budget in recent years.

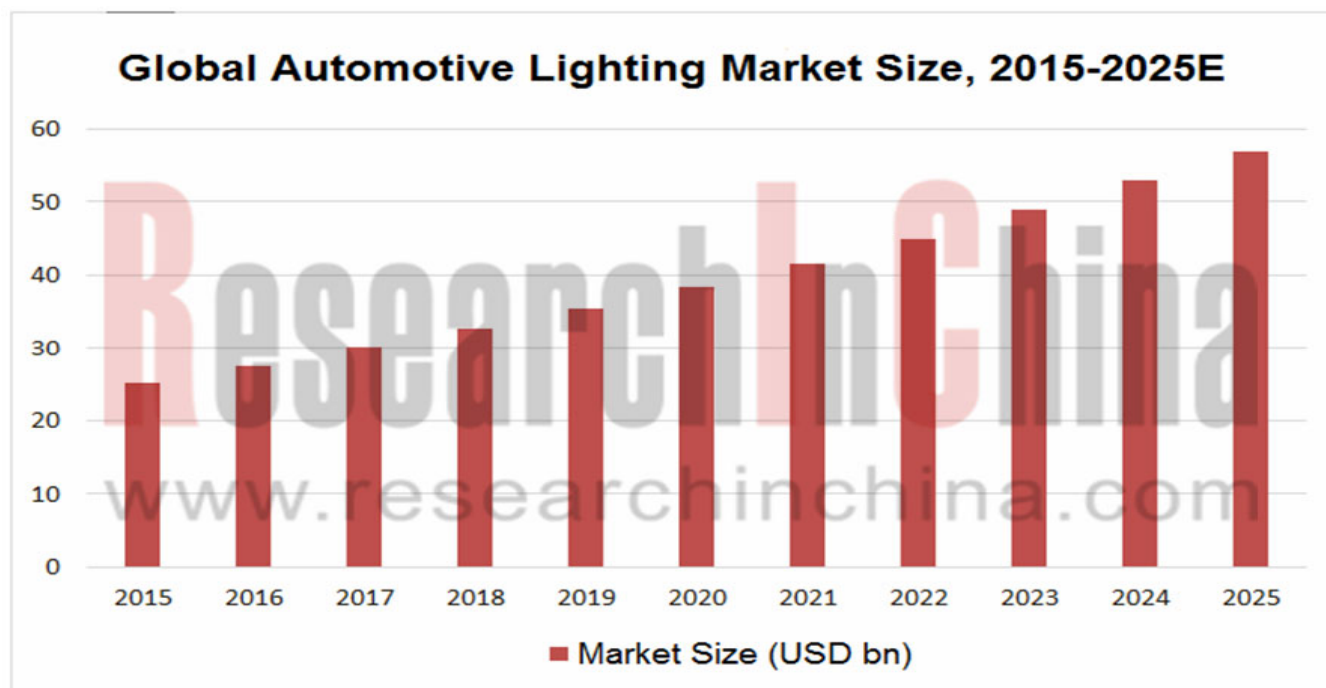
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Global and China Automotive Lighting Industry Report, 2019-2025 highlights the following:

Laser/OLED/AFS/ADB/nigh vision system technologies;

Global and China automotive lighting markets (size, competitive pattern and forecast);

Global automotive lighting manufacturers.



Source: ResearchInChina

1. Headlamp Design

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Tail Lamp Manufacturing Process
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2. Laser/OLED/AFS/ADB/Night Vision System/Intelligent Digital Headlamp

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- Main Clients of Laster Tech

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