

Global Automotive Electronics with Special Focus on OEMs Market

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Abstracts

Automotive Electronics are increasingly utilized in today's automobiles. Beginning with the requirement of providing enhanced engine control, the current breed of automobiles has become more and more reliant on electronics, enabling them in going faster, even while providing highest levels of safety. Today's contemporary cars have evolved into electronic machines, with more and more operations being controlled with electronic control units (ECUs). For instance, a premium segment car can comprise up to 150 such ECUs for controlling virtually all vehicle-related aspects. These can include an engine control unit for managing a car's efficiency, a steering and surround view system for preventing accidents, a telematic system offering information related to local hot spots, an electronic stability/traction control for maintaining appropriate steering control, and sensors for deploying airbags in the event of a collision.

The major trends driving demand for increased penetration of electronics in automobiles include regulatory mandates for improving fuel economy and stringent emission standards as well as requirements for advanced safety systems, consumer demand for safety & security and comfort & convenience features, and growth of hybrid and electric vehicles. Environmental issues and highly stringent government regulations have been forcing auto OEMs to accord greater importance to fuel efficiency.

The report reviews, analyses and projects the automotive electronics market for global and the regional markets including North America, Europe, Japan, Asia and Rest of World. The regional markets further analyzed for 12 independent countries across North America – the United States, Canada and Mexico; Europe – Germany, France, Spain, The United Kingdom and Italy; Japan; Asia – China, India and South Korea. Automotive Electronic products analyzed in this study include Powertrain Electronics, Chassis Electronics, Safety & Security Systems, Entertainment Systems, Communication &

Navigation systems and Other Automotive Electronics.

The global market for Automotive Electronics, estimated at US\$191.3 billion in 2013 and forecast to be US\$204.6 billion in 2014, is further projected to reach US\$314.4 billion by 2020, thereby maintaining a CAGR of 7.3% between 2012 and 2020. OEM Automotive Electronics, accounting for an estimated share of 86.3% in 2013 equating to US\$165.2 billion in the overall Automotive Electronics market, is forecast at US\$177.2 billion in 2014 and expected to register a 2012-2020 CAGR of 7.6% in reaching a projected US\$277.1 billion by 2020.

This 334 page, global market report comprises 136 charts (includes a data table and graphical representation for each chart), supported with meaningful and easy to understand graphical presentation, of market numbers. The statistical tables represent the data for the global market value in US\$ by geographic regions and the product segments. This study profiles 39 key global players and 79 major players across North America – 30; Europe – 18; Japan – 24 and Asia – 7. The report also provides the listing of the companies engaged in the manufacturing and supply of automotive electronics. The global list of companies covers addresses, contact numbers and the website addresses of 303 companies.

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Aisin Seiki Co Ltd

Alps Electric Co Ltd

Autoliv Inc

Borgwarner Inc

Calsonic Kansei Corporation

Continental AG

Delphi Automotive

Denso Corporation

Garmin International Inc

General Motors Company

Harman International Industries Inc

Hella KGaA Hueck & Co

Hitachi Automotive Systems Ltd
Hyundai Mobis Co Ltd
Johnson Controls Inc
Jtekt Corporation
Lear Corporation
Magna International Inc
Magneti Marelli SpA
Mitsubishi Electric Corporation
Omron Corporation
Panasonic Corporation
Pioneer Corporation
Robert Bosch GmbH
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TOM TOM
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Valeo SA
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Yazaki Corporation
ZF Friedrichshafen AG

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Mentor Graphics Acquires Selected Automotive Electronics Assets from MontaVista
Indian Factory Automation Business of Mitsubishi Electric Expanded
Elektrobit and Renesas Electronics in Partnership
Visteon Obtains Major European Contract
Philips Divests Audio, Video, Multimedia and Accessories Operations to Funai
Denso Setting Up Production Facility in Cambodia
Europe's Best in Class Cars Integrated with Safety Products from Autoliv
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Nexteer's Ships its 20 Millionth Electric Power Steering System
Yazaki Corp Starts Construction of Cambodian Plant
Autoliv Crosses the Half a Billion Units Mark for Side Protection Airbags
Autoliv Undertakes Expansion in Indonesia

Continental to Produce Airbag Control Unit with Integrated Sensor Cluster in China
CTS Corporation Acquires D&R Technology LLC
Slovakian Facility of Hyundai MOBIS Commences Manufacture
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New Indian Facility Set Up by Magneti Marelli
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Denso Establishing a Facility in Indonesia
Hitachi Automotive Systems Americas Sets Up New Mexican Facility
UK Electronics Network Launched by NMI
Continental to Open New R&D Facility in Ulm
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Visteon's Chinese Electronics Facility Expanded
Denso Eyes Indian Market with New Plant
ADVICS Sets Up New Production Unit in China
ADVICS Ventures into India
Alpine's Thailand Facility Resumes Production of Car Audios
Joint Venture Between Magneti Marelli and Changchun Fudi
CTS Obtains Asian Automotive Production Programs
Garmin's Worldwide Presence in the Automotive OEM Sector Expanded
Denso Takes Over 3D Business of I-Net Corp
MOBIS Enters Indian Market
Johnson Controls, Pricol in an Indian Joint Venture
ADVICS Sets Up Thai Facility
Clarion's Next GATE, FZ502 and M502 Secure the Good Design Award 2012
TRW Automotive Commences Production of Electric Steering in Brazil
GO 2050 and Via Series of PNDs Introduced by TomTom in Indonesia
Hitachi Automotive Systems Europe GmbH Acquires HUECO Automotive GmbH

5. KEY PRODUCT TRENDS

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Infotainment System

TRW Showcases Novel Seatbelt Concept

TomTom HD Traffic to be Integrated into Toyota Vehicles

Pedestrian Collision Detection Sensor Developed by Denso

Allegro MicroSystems Launches Innovative Package Option for its Sensor IC Portfolio

Novel Full-Featured Advanced CD Receivers Introduced by Alpine Electronics

BorgWarner Turbochargers to Power New Range of Mercedes-Benz Commercial Vehicles

Clarion Launches the NX502ETRK Navigation System for Large Vehicles

Continental and BMW Group Form a Research and Development Pact

Continental Presented with Toyota's Technology & Development Award

Continental's "Driver Focus" Concept Vehicle Aims to Grab Driver's Undivided Attention

Mentor Graphics Offers Electrical Design Software to Tesla Motors

Novel Low Voltage Digital Output Hall Effect Sensors Launched by Melexis

Car Display System with Free-Form Screen Developed by Mitsubishi Electric

STMicroelectronics Introduces Microcontrollers for Enhancing Vehicle Safety

World's First Integrated, In-vehicle Wireless Cell Phone Charger from Denso

Bosch and PSA Peugeot Citroën Engaged in Developing Hydraulic Hybrid for Passenger Cars

Bosch Engages in Expanding Driver Assistance Systems

Alpine Electronics Extends its Product Offerings

Alpine Electronics Launches the Largest Audio-Video-Navigation System

Agero Introduces AgeroViewSM DevKit

Autoliv's New Seatbelt Technology for Mercedes' Future S-Class

BMW "Dynamic Light Spot" Illuminated with Autoliv's Technology

Three New DVD Receivers with Monitors Launched by Boss Audio

New In-Vehicle Infotainment Devices from Clarion

Clarion Launches Powerful Range of In-Vehicle Subwoofers

Delphi Showcases New Technologies

Garmin Offers Next-Generation In-Vehicle Infotainment System

Pioneer Offers Expanded In-Car Connectivity with New Apps

STMicroelectronics Debuts New Technology Supporting Smaller and Smarter Vehicle Electronics

RKJXW2 Series Multi Control Device Developed by Alps

Acura's Next-Generation AcuraLink Connected Car System to be Powered by Agero

Novel Range of Lightweight Airbag Inflators Introduced by TRW

Fairchild Semiconductor Offers 40V PowerTrench MOSFET for Power Steering Applications

Superior Performance Millimeter-Wave Radar Developed by Denso
Novel Dual-Coil Ignition System from BorgWarner BERU
Continental Supports Car to Car Communication Consortium for Car-to-X Communication
New Connector Technologies Demonstrated by Delphi
Melexis Launches First Monolithic Slave IC for LIN-Based RGB LED Control for Vehicle Lighting
Visteon Showcases Most Recent Automotive Electronics Innovations at Electronica 2012 in Munich
Toshiba Electronics Europe Develops Security Module
Denso Offers Large-Screen Head-Up Display
Denso Demonstrates the Universality of "Talking Car" Technology Language
Novel Automotive 2.2 MHz Multiple Output Regulator Series Introduced by Allegro
Magna's Active Grille Shutter System Introduced
Integrated Stability Control and Electric Park Brake System to be Launched by TRW in 2014
STMicroelectronics Introduces Full-Digital Amplifier Range
Denso and Toyota in a Joint Development Agreement
Continental Partners with SAS Automotive Systems for Commercial Vehicle Cockpit Systems
TRW's New Electronic Horn System Developed
Garmin Launches Novel In-Dash Navigation Features for Limited 2013 Model Year Chrysler and Dodge Vehicles
Allegro Launches New Automotive-Grade High Current LED Driver IC
Pioneer Launches Six New Single CD Receivers
New Vision Sensor for Active Safety Systems from Denso
Car Amplifier Portfolio Extended by Boss
Multimedia Infotainment System for Fiat Group Developed by Continental
New Generation Car Infotainment Systems Released by STMicroelectronics
TSVN Series Full Segment Digital Terrestrial TV (ISDB-T) Tuner for Automobiles Developed by Alps
Boss Audio Announces Availability of Full-Featured Navigation Receiver
Clarion Introduces the CZ302E CD Car Radio
Alps Offers the UGXZD-G Series Bluetooth™ HCI Module with Antenna for Automobiles
SSCL Series Two-Way Detector Switch with Female Connector Terminal Developed by Alps
New Seatbelt System Launched by Autoliv
Pioneer Introduces AppRadio™ 2 with Android Connectivity
Cyber NAVI Car Navigation System Launched by Pioneer in Japan

Freescale Semiconductor and First Automobile Works Establish a Partnership
Wireless In-Vehicle Device Charging Under Development by Delphi
New Range of Electronic Stability Control Systems Introduced by TRW
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Commercial Embedded Navigation PONTUS BI-8300GT Introduced by Hyundai MOBIS
Renesas Electronics Unveils 14 New Intelligent Power Devices for Vehicle Body Applications
Agero's Novel Connected Vehicle Platform Bundled with New Infiniti Connection™
BorgWarner's First Two-Stage Turbocharging System for Commercial Vehicles Launched in Asia
Serial Flash Memory Devices for the Automotive Market from Windbond
Eco-Friendly Airbag Inflator from Autoliv
Latest iPhone Car Radio Introduced by Boss
New-Generation RH850 Microcontroller for Auto Applications from Renesas Electronics
Development and Mass Production of HGPRDT Series High-Precision Latch 2-Phase Type Magnetic Sensor Undertaken by Alps
Advanced 3D Display Technology from Johnson Controls
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 - Boss Audio Systems (United States)
 - Delphi Automotive (United States)
 - Garmin International Inc (United States)
 - General Motors Company (United States)
 - Onstar Corporation (United States)
 - General Motors Components Holdings LLC (United States)
 - Sirius XM Radio Inc (United States)
 - Harman International Industries Inc (United States)
 - Immersion Corporation (United States)
 - Inteva Products (United States)
 - Johnson Controls Inc (United States)
 - Key Safety Systems Inc (United States)
 - Lear Corporation (United States)

Magna International Inc (Canada)
Mcintosh Laboratory Inc (United States)
Mentor Graphics Corporation (United States)
Meritor Wabco Vehicle Control Systems (United States)
Methode Electronics Inc (United States)
Myron & Davis (United States)
Nexteer Automotive (United States)
Pioneer Electronics (USA) Inc (United States)
Sanmina Corporation (United States)
Sense Technologies Inc (United States)
Standard Motor Products Inc (United States)
Tenneco Inc (United States)
TRW Automotive Holdings Corp (United States)
Visteon Corporation (United States)

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Borgwarner Beru Systems GmbH (Germany)
Brose Fahrzeugteile GmbH & Co Kg (Germany)
Continental AG (Germany)
Hella KGaA Hueck & Co (Germany)
Behr-Hella Thermocontrol GmbH (Germany)

Leopold Kostal GmbH & Co Kg (Germany)
Magneti Marelli SpA (ITALY)
Melexis Microelectronic Systems (Belgium)
Novotechnik Messwertaufnehmer Ohg (Germany)
Robert Bosch GmbH (Germany)
Royal Philips Electronics (Koninklijke Philips Electronics NV) (The Netherlands)
TE Connectivity Ltd (Switzerland)
Tom Tom (The Netherlands)
Valeo SA (France)
Wabco Europe BVBA (Belgium)
ZF Friedrichshafen AG (Germany)
ZF Lenksysteme GmbH (Germany)

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Alpine Electronics Inc
Calsonic Kansei Corporation
Denso Corporation
Hitachi Automotive Systems Ltd
Clarion Co Ltd
Jtekt Corporation
JVC Kenwood Corporation
Keihin Corporation
Mitsubishi Electric Corporation
Omron Corporation

Panasonic Corporation
Panasonic Automotive Systems Company
Pioneer Corporation
Renesas Electronics Corporation
Sanken Electric Co Ltd
Sony Corporation
Takata Corporation
Tokai Rika Co Ltd
Toyota Industries Corporation
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 - Miga Trading Sdn Bhd (Caliber Car Audio Technology) (Malaysia)
 - Shanghai Delco Electronics & Instrumentation Co Ltd (China)
 - Shenzhen Hangsheng Electronics Co Ltd (China)
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