

Automotive Electric Products – an Industry and Market Analysis

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Abstracts

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Lights, heating, ventilation, radiator fans, power windows, and entertainment systems all place electrical "loads" on the car's battery – that is, they draw power from it – and recharging the battery, in turn, places a constant load on the engine. Some cars employ more than 35 electric motors in various ways

Although the electronics content of vehicles is continually increasing, the vehicle market itself is expanding more slowly than in previous years. The net effect is a steady increase in the value of the automotive electronics market as more onboard systems are converted to electrical/electronic systems.

The car industry has become one of the most promising new markets for electric products manufacturers. An increasing number of functions that were traditionally performed by mechanical components manufacturers are now handled by electrical/electronic components manufacturers.

OBJECTIVE

The iRAP study focuses on key automotive electric products, and provides data about the size and growth of the automotive electric products market, company profiles and industry trends. The report provides market in North America, Europe, Japan, China, India, Korea and the rest of the world (ROW) for automotive electric products and potential business opportunities in the future.

The study has a thorough coverage of the underlying economic issues driving the automotive business, as well as assessments of new advanced electric products that companies are developing. Legislative pressures for more safety and environmental protection, as well as users' expectations for improved car functionality, comfort and fuel economies are also covered. The report provides the most thorough and up-to-date assessment that can be found anywhere on the subject. The study also provides extensive quantification of the many important facets of market developments in automotive electric products in the world.

This study explores the proliferation of electrical products into the automotive platform with a special focus on lighting, battery, alternator, starter, switches, ignition systems, wiring harnesses, motors, solenoids, relays, fuses, spark plugs and other products. The report identifies and evaluates automotive electric product markets and technologies with keen potential growth.

The study provides the most complete accounting of automotive electric products market growth in North America, Europe, Japan, Korea and the rest of the world.

SCOPE AND FORMAT

The market data contained in this report quantifies opportunities for automotive electric products. In addition to product types, it also covers the many issues concerning the merits and future prospects of the automotive electric products business, including corporate strategies, information technologies, and the means for providing these highly advanced products and service offerings. It also covers in detail the economic and technological issues regarded by many as critical to the industry's current state of change. The competitive position of the main players in the OEM and aftermarket of automotive electric products market and the strategic options they face are also discussed, as well as such competitive factors as marketing, distribution and operations.

SUMMARY

As consumers demand ever more sophisticated and feature-loaded vehicles, the global automotive industry faces growing challenges to balance these expectations with space constraints and weight concerns. Every component receives scrutiny to determine if it can be made smaller and lighter to promote fuel efficiency and performance and help fit more content into the available space. In addition, vehicle manufacturers and suppliers must increasingly consider environmental concerns such as recyclability, as well as overall performance. Electrical loads in vehicles today are growing every year resulting

in consequent increases in cable harness, power distribution box, relay, and switch ratings, as well as costs.

Big automobile manufacturers are becoming increasingly global and they expect that their specific requirements for supplied products will be fulfilled quickly and flexibly worldwide. This will require presence near the customer. Continued consolidation and increasing global competition are forecast for the automotive electric parts industry. The future prospects for large domestic producers are likely to depend on their ability to obtain contracts with manufacturers, as well as to retain contracts with big OEMs against competition from overseas suppliers. For smaller second- and third-tier suppliers, the key is likely to be establishing strong relationships with primary suppliers.

Report Highlights

Automotive electric products market growth will continue despite slowing auto sales and production.

The worldwide automotive electric products market will reach \$74 billion in 2006 and will continue to grow at an AAGR of 8.1% to reach \$110 billion by 2011.

From 2006 to 2011, electric motors, switches, etc. will show the highest growth rate, 11%, followed by ignition system at an AAGR of 9.3 %, and lighting and battery at 7.7%.

The automotive electrical products business is an OEM business as well as consumer aftermarket. It requires modest technology for manufacturing, so there are a large number of players besides tier-one suppliers, and there is stiff price competition for all the ten automotive electric products.

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