

Automotive Lighting Market by Technology (Halogen, Xenon, & LED), Adaptive Lighting (Front, Rear & Ambient), Position (Front, Rear, Side & Interior), Two-Wheelers (Front, Rear, & Side), by Region & Vehicle Type - Industry Trends & Forecast to 2020

<https://marketpublishers.com/r/A2EE57C1BE3EN.html>

Date: June 2015

Pages: 203

Price: US\$ 5,650.00 (Single User License)

ID: A2EE57C1BE3EN

Abstracts

An automobile is equipped with forward illumination lamps such as headlamps, driving lamps, fog lamps, and cornering lamps. Signal and identification lights such as front position parking lamps, daytime running lamps, turn signals, tail lamps, brake lights, centre high mount stop lamp (CHMSL), emergency stop signal (ESS), and reverse lights are also provided in automobiles. Considering the above-mentioned technologies, this report classifies and defines the automotive lighting market size, in terms of volume and value. Market size, in terms of volume, is provided in million units from 2013 to 2020, while the market size, by value, is provided in terms of \$million.

The automotive lighting market has witnessed considerable growth in the emerging economies of Asia such as China and India, owing to low manufacturing costs and favorable government policies.

This report segments the automotive lighting market as follows: by position (front, rear, side, and interior), by technology (halogen, xenon, and LED), adaptive lighting, by application (front, rear, and interior) and two-wheeler, by position (front, side, and rear). Key players in the automotive lighting market have also been identified and profiled.

The growth in this market is primarily driven by increasing vehicle sales and production and technological advancements triggered by growing safety concerns and stringent lighting regulations.

Asia-Oceania is estimated to grow at the highest CAGR—that is, 8.80%—during the forecast period. China is the largest consumer of automotive lighting in the Asia-Oceania region. The reason behind this upswing is the growing sales of premium cars, which is in turn driven by rise in disposable income.

The report also provides a comprehensive review of market drivers, restraints, opportunities, challenges, and key issues in the global automotive lighting market. Apart from analysing the quantitative aspects of these markets, the report also covers qualitative aspects, such as value chain analysis, and Porter's Five Force analysis for the global automotive lighting market.

The automotive lighting market is dominated by a few major players, such as Koninklijke Philips N.V. (The Netherlands), General Electric (U.S.), Magneti Marelli (Italy), Valeo (France), and Koito Manufacturing Co., Ltd. (Japan). The key strategies adopted by these market players are new product development and expansion in potential markets.

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About

The global automotive lighting market is characterized by three main technologies such as halogen, xenon/HID, and LED. Halogen technology is used to a very large extent compared to the other types due to its properties, availability, and cost. LED technology is slowly gaining growth mainly due to its low energy consumption and increased service life. Halogen and xenon lamps have an average life span of XX hours and XX hours respectively; whereas, LED has an average life span of more than XX hours which is almost XX times higher than that of halogen lamps. The industry has been into existence from several decades, but still is at a growing phase due to the increasing vehicle demand across various regions which has led to the consumption of more automotive lighting units; thus, augmenting the global value of the market. Intelligent lighting systems like adaptive front lighting system (AFS) adjust the cone of light of the high beam to road conditions and dip the beam wherever needed. This improves the safety aspect of the vehicle as it provides improved visibility and at the same time does not distract others.

The automotive lighting market is driven by the increasing concern towards road safety, strict automotive lighting regulations, and high purchasing power giving rise to demand for advanced technologies, and low energy consumption in LED lighting technology. Majority of the manufacturing units are present in the European and Asia-Pacific regions which also acts as a driver for the local markets. Few factors hindering the value in this market are the high cost of LED lighting technology and exorbitant R&D costs.

Major players in the automotive lighting industry are Koito Manufacturing Ltd (Japan), Valeo S.A. (France), Hella KGaA Hueck & Co. (Germany), Magneti Marelli S.p.A (Italy), and Stanley Electric Co. (Japan). Koito has a broad range of automotive lighting products and components specifically for passenger cars. The headlamp product range varies from high quality HID and halogen headlamps for the mid-class passenger car segment to LED headlamps for the premium segment. The company also supplies lighting components such as light source, reflectors, vanity mirrors, etc. across major regions such as Asia-Pacific, North America, and Europe. It also operates various subsidiaries across these regions making it the most versatile player in the automotive lighting market.

The global automotive lighting market value is estimated to grow at a CAGR of XX% from 2013 to 2020. In 2013, the value is estimated to be the highest in Asia-Pacific, with a share of about XX%. Next to Asia-Pacific region the automotive lighting market size in

terms of value is estimated to rank as: Europe (about XX%), North America (about XX%), and ROW (XX%) in 2013.

Asia-pacific: largest market for automotive lighting

The annual vehicle production level in Asia-Pacific region is higher than that of in the other regions such as Europe and North America. In 2013, Asia-Pacific was estimated to be the largest market in terms of value. This region is estimated to lead the market by 2020 as well. In 2013, Asia-Pacific was estimated to have a share of XX%; whereas, Europe will have a share of XX%. North America will be at third position with a market share of XX% and ROW countries at fourth XX%. By 2020, Asia-Pacific's market share is further expected to increase by around XX%.

Front lighting: largest lighting segment, by position

Front lighting of a vehicle is of major concern for the producers as well as consumers as it is necessary that it complements the entire vehicle in terms of design and styling. Thus, the manufacturers have started making customized lighting solutions depending upon the requirement. More advanced technologies like AFS have been developed which are expensive than other lighting units in a vehicle. In 2013, front lighting segment was estimated to have the high share of XX%, whereas, rear lighting segment was estimated to have XX%. Interior and side lighting segments follow rear lighting with a share of XX% and XX% respectively.

Passenger car: high volume market for automotive lighting

For the study, the automotive lighting segment is classified based on vehicle types as passenger cars, light commercial vehicles, heavy trucks, and buses. Passenger cars are the highest produced vehicle type across all the regions every year. In 2012, passenger cars accounted for almost XX% of the global automotive production. The lighting units used in passenger cars are expensive than the units in other vehicle types such as LCVs and HCVs. Thus, it is the largest automotive lighting market by vehicle types. In 2013, passenger car segment was estimated to lead the automotive lighting market with a share of XX%; whereas, LCVs, heavy trucks, and buses together account for only XX%.

Halogen: prevalent lighting technology in automotive industry

Three widely used technologies in automotive are halogen, xenon/HID, and LED. But,

halogen is the most widely used and has been in use since many years mainly due to its easy availability and low cost. In 2013, halogen technology was estimated to account for almost XX% of the global automotive lighting market value. LED technology follows halogen with a share of XX% and Xenon/HID with XX%. With LED penetration levels increasing with a promising growth rate, halogen technology still are estimated to lead the global automotive lighting market by 2020.

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