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Global and China Automotive Head-up Display (HUD) and Instrument Cluster Industry Report, 2014-2015

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Abstracts

Global and China Automotive Head-up Display (HUD) and Instrument Cluster Industry Report, 2014-2015 is primarily concerned with the following:

1 Global and China automobile market and industry
2 Global automotive display market and industry
3 Development trends in auto HUD
4 Auto HUD industry and market
5 Instrument cluster industry and market
6 Seven key auto HUD and instrument cluster manufacturers

Now that Head-up Display (HUD) manufacturers and instrument cluster manufacturers are completely coincident, we put and study them together. HUD is divided into two categories: one is display in Windshield (shortened to W-type), the other is Combiner (abbreviated as C type). The latter has poor display content and low practical value, thus leading to lower price and narrow profit. C type HUD market, as it were, has a bleak prospect, which did not appeal to both consumers and manufacturers.

W-type generally applies HB-LED as light source, and 1.5-3.1-inch TFT-LCD as picture source. Meanwhile, using complex optical engine, it projects pictures on the Windshield. Due to the large dynamic range of ambient brightness, extreme luminance and excellent brightness control are required for the HUD (depending on the brightness of the background of the virtual display) in order to produce an image that can be easily read. Any optical distortions through the shield are electronically corrected on the display. W-type has so much higher technical threshold that enterprises are required to master the knowhow of both electronics and optics. At present, only Japanese and German producers have the manufacturing capabilities. W-type display has high contrast ratio

and brightness, rich content, and good practicability, hence embracing broad market prospects.

It is expected that in 2015 the shipments of W–type HUD approximate 1.9 million units and C–type 700,000 units. By 2019, W–type will surge to 10.3 million units while C-type will total only 1 million units. In the future, HUD will adopt DLP projection + Laser Diode. Moreover, HUD, or the Augmented Reality-type HUD, can perfectly match up with ADAS, which is required to use Quad-core processor, whose master frequency is not less than 1.5 GHz. At the same time, it needs extremely complicated software system, whose price will probably exceed USD2,000. Even so, it has high practicability and technological content so much so that it can be accepted by manufacturers and consumers. Therefore, the market size will balloon. It is projected that the market size will reach USD431 million in 2015 and USD1.42 billion in 2019, being the fastest-growing product in automotive electronics.

At present, there are only a few key HUD suppliers, including Japan’s Nippon Seiki and Denso and Germany’s Continental and Bosch. Denso’s major client is Toyota whereas Nippon’s client is BMW, which accounted for 80% of BMW HUD orders. Continental’s major clients consist of Benz, BMW, and Audi.

Up to 98% of HUD market is dominated by instrument cluster manufacturers, so HUD can be categorized in instrument cluster industry. HUD will also stimulate the development of instrument cluster industry.

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