

# **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.

## Contents

### **1 GLOBAL AND CHINA AUTOMOBILE MARKET**

- 1.1 Global Automotive Market
- 1.2 Overview of Chinese Automotive Market
- 1.3 Latest Development of Chinese Automotive Market

### **2 AUTOMOTIVE DISPLAY INDUSTRY AND MARKET**

- 2.1 Trends in Automotive Display
- 2.2 Automotive Display Market
- 2.3 Automotive Display Industry
- 2.4 Infotainment LCD Panel
- 2.5 Automotive Instrument Market
- 2.6 Automotive Instrument Industry
- 2.7 China's Automotive Instrument Market

### **3 HEAD-UP DISPLAY (HUD) MARKET AND INDUSTRY**

- 3.1 Overview of HUD
- 3.2 Trend of HUD
- 3.3 Continental HUD
- 3.4 Augmented Reality Head-Up Display Overview
- 3.5 Continental Augmented Reality Head-Up Display
- 3.6 Head-Up Display Market Size
- 3.7 Head-Up Display Market Player

### **4 AUTOMOTIVE INSTRUMENT AND HUD MANUFACTURERS**

- 4.1 Continental
- 4.2 Nippon Seiki
- 4.3 Visteon
  - 4.3.1 Yanfeng Visteon (YFV)
- 4.4 Denso
- 4.5 Magneti Marelli
- 4.6 Shanghai Delco
- 4.7 Bosch

## **5 AUTOMOTIVE LCD MANUFACTURERS**

5.1 Japan Display

5.2 Innolux

5.3 AUO

## Selected Charts

### SELECTED CHARTS

Global Automobile Sales Volume, 2010-2016E  
Output of Global Light-duty Vehicles by Region, 2003-2015  
China's Automobile Sales Volume, 2005-2015  
China's Automobile Sales Volume (by Type) and YoY Growth, 2005-2014  
Market Size of Automotive Display by Shipments, 2013-2019E  
Market Size of Automotive Display by Revenue, 2013-2019E  
Automotive Display Shipments by Application, 2015-2019E  
Market Share of Major Global In-vehicle Display Screen Manufacturers by Shipments, 2015  
Market Share of Major Global In-vehicle Display Screen Manufacturers by Revenue, 2015  
Infotainment Vendors vs LCD Panel Suppliers  
Market Share of Major Global Infotainment Display Screen Manufacturers, 2015  
OEM-Infotainment Shipments by Size, 2015 vs 2019E  
Instrument Cluster Shipments by Size, 2015 vs 2019E  
Market Size of Instrument Cluster, 2013-2019E  
TFT-LCD Instrument Cluster Shipments, 2015-2019E  
Revenue of Major Global Instrument Cluster Manufacturers, 2014-2015  
Key Customers of Instrument Cluster Manufacturers  
Market Share of Chinese Instrument Cluster Manufacturers, 2015  
Structure of HUD  
Basic HUD Geometry  
Structure of Audi A6 HUD  
Trends in HUD  
HUD Block Diagram w/ DLP  
Structure of Continental HUD  
Continental's HUD Application  
Market Size of Automotive HUD, 2013-2019E  
Automotive HUD Shipments, 2013-2019E  
Market Share of Major Automotive HUD Manufacturers, 2015  
Global Distribution of Continental's Automotive Interior  
Revenue and Operating Margin of Continental's Automotive Interior, 2007-2015  
Revenue Breakdown of Continental's Automotive Interior by Region, 2009-2014  
Continental's Instrument Cluster Product List  
Continental's OLED Instrument Cluster

Multi Viu Professional 12

Continental's Instrument Cluster Market Position

Continental's Combiner HUD

Revenue and Operating Income of Nippon Seiki, FY2008-FY2016

Revenue Breakdown of Nippon Seiki by Product, FY2010-FY2015

Revenue Breakdown of Nippon Seiki by Region, FY2012-FY2015

Global Location of Nippon Seiki

Sales Mix of Nippon Seiki by Customer, FY2015

Revenue and EBITDA of Visteon, 2013-2015

Visteon's Quarterly Revenue and Gross Margin, 1Q/2014-2Q/2015

Visteon's Quarterly EBITDA, 1Q/2014-2Q/2015

Revenue of Visteon's Automotive Electronics by Product, 2013-2014

Revenue of Visteon's Automotive Electronics by Product, 2015

Revenue of Visteon's Automotive Electronics by Region, 2013-2015

Revenue of Visteon's Automotive Electronics by Customer, 2013-2014

Visteon's 3D Instrument Cluster

YFV's Organization

Structure of YFV

Organization of Yanfeng Visteon Electronics

Distribution of YFVE Production Bases

Revenue Breakdown of Visteon Electronics in China by Customer, 2015

Revenue and Operating Margin of Denso, FY2006-FY2016

Distribution Proportion of Denso's OEM Customers, FY2008-FY2015

Revenue of DENSO by Product, FY2012-FY2015

Revenue and Operating Income of Denso by Region, FY2014 vs FY2015

Revenue and Operating Income of Denso by Region, FY2015 vs FY2016

Denso's ADAS

Revenue and EBIT Margin of Magneti Marelli, 2006-2015

Revenue Breakdown of Magneti Marelli by Product, 2013

Revenue and Operating Income of JDI, FY2013-FY2016

The JDI Group in Transition

Quarterly Revenue of JDI by Business, 2013Q2-2015Q2

Quarterly Operating Margin of JDI, 2013Q2-2015Q2

Revenue and Operating Margin of INNOLUX, 2010-2015

INNOLUX Area Shipments and TFT LCD ASP Trends, 3Q13-2Q15

INNOLUX's Small & Medium Size Unit Shipments and Sales Trends, 3Q13-2Q15

INNOLUX Sales Breakdown by Size, 3Q2013-2Q2015

Revenue Breakdown of INNOLUX by Application, 3Q2013-2Q2015

Overview of INNOLUX's TFT-LCD Fabs

Overview of Touch Sensor Fabs  
Organization Structure of AUO  
Revenue and Gross Margin of AUO, 2009-2015  
Revenue of AUO by Region, 2012-2014  
Revenue of AUO by Application, 2012-2014  
Shipments of AUO by Application, 2012-2014  
Major Suppliers of Key Raw Materials and Components  
Revenue Breakdown of AUO Display by Application, 2Q14-2Q15  
Revenue Breakdown of AUO Display by Size, 2Q14-2Q15  
Shipments and ASP of AUO, 2Q14-2Q15  
AUO's Small & Medium-sized Panel Shipments by Region & Revenue, 2Q14-2Q15  
AUO's Production Line List  
AUO's LCM Base  
AUO's Automotive Panel List

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