

Global and China Automotive Instrument Industry Report, 2013

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Abstracts

The report highlights the followings:

1. Recent Developments of Global Automotive Market;
2. Recent Developments of China Automotive Market;
3. Introduction to Automotive Instrument & HUD;
4. Study on Automotive Instrument Market;
5. Top 10 Automotive Instrument Makers;

In 2012, the market size of global automotive instrument industry claimed USD12.9 billion, with the targeted figure in 2013 and 2014 soaring to USD14.1 billion and USD16.2 billion, respectively. The big rise comes as the fact that low- and medium-range automotive models are shifting towards all-digital TFT-LCD instrument from mechanical ones while top-grade automobiles are mostly employing TFT-LCD with ever-increasing display size. For example, the latest edition of Benz S Class employs 12-inch TFT-LCD, so does Citro?n Grand C4 Picasso whose 12-inch TFT-LCD instrument were provided by Magneti Marelli.

Another driving force comes from HUD. It is very likely that Infotainment and HUD will integrate together. Moreover, a majority of instrument makers are also involved in the production of Infotainment, with cases in point including AisinAW and DENSO from Japan, Visteon and Delphi from the US, Continental from Germany and Mobis from South Korea.

By 2020, the worldwide sales volume of automobiles equipped with HUD is projected to jump from 1.2 million in 2012 to 15.8 million in 2012. And the figure this year is estimated to increase 7% over the preceding year. In 2012, only 2% sold automobiles

were equipped with HUD, and the targeted figure by 2020 will grow to 19%. In 2010, the assembly rate of HUD system for Japanese cars topped the list, but Japan will lose out to Europe by 2020 in this regard. In addition, DLP is likely to replace high-priced laser projection, cutting down the cost substantially. Besides, LCOS technology will see breakthroughs and is likely to present striking performance in low-end HUD.

Leading HUD suppliers include Continental, Denso, Johnson Control and Nippon Seiki. Some Japanese auto Infotainment companies also show their interests in HUD market. Cases in point include Pioneer and J&K, which made intensive efforts to make inroad in HUD market by employing DLP and LCOS technologies. And the limousine market grabs a larger piece of the pie. Continental enjoys a lion's share in the limousine instrument market, with the market share in HUD market surpassing 50%, followed by Denso with the proportion of roughly 15% and the major clients going to Toyota. HUD for Chevrolet Corvette under GM is provided by Japan-based Nippon Seiki, while Instrument Panel is provided by IAC.

In 2013, the market size of China automotive instrument industry approximated USD2.4 billion, with the expected figure by 2017 hitting USD4 billion. The massive surge is attributable to the reason that most of low- and medium-end passenger cars will replace old-fashioned mechanical instruments with all-digital TFT-LCD. For now, there have BYD models equipped with TFT-LCD instrument.

SDE is primarily focused on homemade passenger car market and it offers low-range instrument for nearly all homemade cars except BYD; YFV has big customers including SVW, SGM, Changan Ford, SAIC Motor, and Dongfeng Nissan; DENSO is instrument provider for Toyota; for Continental, main customers cover FAW-VW, Beijing Benz Automotive, BMW Brilliance Automotive, Wuhu Chery, and Ford Nanjing.

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