

# Global and China Automotive Lighting Industry Report, 2014-2015

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## Abstracts

Global and China Automotive Lighting Industry Report, 2014-2015 focuses on the followings:

1. Global automobile market and industry;
2. China automobile market and industry;
3. LED industry and market;
4. Automotive lighting industry and market;
5. 18 typical automotive lighting companies.

Global automotive lighting market size was USD25.3 billion in 2014, and is expected to grow by 10.8% to USD28 billion in 2015, the highest growth rate since 2010, and reach USD30.1 billion in 2016, a year-on-year rise of 7.5%.

There are two reasons for significant expansion of automotive lighting market. One is substantial improvement in the penetration of LED. As the price of LED chip continues to drop, more and more companies adopt LED to make headlamps. Despite the price of LED chip declines, LED headlamps are still more expensive than halogen lamps. About 4% of headlamps were made of LED in 2014. The figure rose to 7% in 2015 and is expected to hit 15% in 2017 and 21% in 2020, as a growing number of companies employ LED in the pursuit of emotional or aesthetic appearance. The other reason is the use of ADB/AFS. The penetration of AFS will arrive at 15% in 2015, and that of ADB 3% in the year and is predicted to stand at 10% in 2020 and 25% in 2025. The adoption of ADB makes headlamps more complicated and raises the cost. In addition, laser headlamps and OLED tail-lamps have come into being. The penetration of laser headlamps, which are extremely expensive, is expected to reach 15% in 2025.

Global economic downturn, especially the economic slowdown in China, will prolong the downward trend in the Chinese automobile market over the next couple years, thus slowing expansion of the automotive lighting market. Moreover, the deflation has been severe.

From the perspective of industry, big companies hold an increasingly dominant position, finding a higher rate than small ones in terms of revenue growth. Valeo is expected to be the one performing best in 2015 with a growth rate of up to 19%. Valeo won nearly 90% of headlamp orders of Volkswagen's Passat B6 platform and 1/3 of Audi's headlamp orders. The competitor- Hella is suffering market share contraction.

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