GLOBAL AUTOMOTIVE LIGHTING MARKET

BY POSITION (Front, Rear, Side, & Interior), TECHNOLOGY (Halogen, Xenon/HID, & LED), VEHICLE TYPE (Passenger Car, LCV, Bus, & Heavy Truck), & GEOGRAPHY

– Global Trends & Forecast To 2020
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1 EXECUTIVE SUMMARY

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.

1.1 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%.

1.2 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.
1.3 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%.

1.4 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.
2 PREMIUM INSIGHTS

2.1 AUTOMOTIVE LIGHTING MARKET, BY SEGMENT

FIGURE 1

AUTOMOTIVE LIGHTING MARKET SHARE (VALUE), BY SEGMENT, 2013 ($MILLION)

Source: Industry Associations, Expert Interviews, and MarketsandMarkets Analysis
2.2 AUTOMOTIVE LIGHTING MARKET, BY TECHNOLOGY

FIGURE 2

AUTOMOTIVE LIGHTING MARKET SNAPSHOT (VALUE),
BY TECHNOLOGY, 2011-2020 ($MILLION)

Source: Industry Associations, Expert Interviews, and MarketsandMarkets Analysis
3 AUTOMOTIVE LIGHTING MARKET, BY POSITION

3.1 AUTOMOTIVE LIGHTING MARKET, BY POSITION

3.1.1 MARKET ESTIMATES (VOLUME), BY POSITION

TABLE 1

AUTOMOTIVE LIGHTING MARKET SIZE, BY POSITION,
2011-2020 (‘000 UNITS)

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<tbody>
<tr>
<td>Front</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
</tr>
<tr>
<td>Rear</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
</tr>
<tr>
<td>Side</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
</tr>
<tr>
<td>Interior</td>
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<tr>
<td>Total</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
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</tbody>
</table>

*e-Estimated; p-Projected

Source: OICA statistics, Industry Associations, Experts Interviews, and MarketsandMarkets Analysis

The global demand for automotive lighting is estimated to be XX thousand units in 2013, which is projected to grow to XX thousand units in 2020, at a promising CAGR of XX%.

The front lighting is the largest market for automotive lighting, it is anticipated to grow from XX thousand units in 2013 to XX thousand units in 2020, at a promising CAGR of XX%. The rear lighting is the second largest market which is estimated to be XX thousand units in 2013 and projected to grow to reach XX thousand units in 2020, at the CAGR of XX%. The interior lighting market is anticipated to grow at a highest CAGR of XX% between 2013 and 2020.
The automotive lighting market is estimated to be dominated by the front lighting with a XX% share in 2013, which is projected to reach XX% by 2020. In 2013, the market share for the rear lighting is estimated to show a decline from XX% (2013) to XX% (2020), whereas, the market share for the interior lighting is projected to increase to XX% by 2020 from XX% in 2013.
4 AUTOMOTIVE LIGHTING MARKET, BY VEHICLE TYPE

4.1 AUTOMOTIVE LIGHTING MARKET, BY VEHICLE TYPE

FIGURE 4

AUTOMOTIVE LIGHTING MARKET SHARE (VALUE), BY VEHICLE TYPE, 2013 VS 2020

The market is estimated to be dominated by the passenger car lighting with a XX% market share in 2013, which is projected to increase to XX% in 2020. The market share for the LCV lighting is estimated to increase from XX% (2013) to XX% (2020), whereas, the market share for the heavy truck lighting is anticipated to decrease to XX% in 2020 from XX% in 2013.

Source: MarketsandMarkets Analysis
4.1.1 ASIA-PACIFIC

4.1.1.1 Market Size Estimates, By Vehicle Type

**TABLE 2**

**ASIA-PACIFIC: AUTOMOTIVE LIGHTING MARKET SIZE, BY VEHICLE TYPE, 2011-2020 ($MILLION)**

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<tbody>
<tr>
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<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
</tr>
<tr>
<td>LCV</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
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<tr>
<td>Bus</td>
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<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
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<tr>
<td>Heavy Truck</td>
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<td>XX</td>
<td>XX</td>
<td>XX</td>
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<tr>
<td>Total</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
</tr>
</tbody>
</table>

*e- Estimated; p- Projected

Source: OICA statistics, Industry Associations, Experts Interviews, and MarketsandMarkets Analysis

The lighting market for passenger car is projected to grow from $XX million in 2013 to $XX million in 2020, at a promising CAGR of XX% during the forecast period. The heavy truck and bus lighting markets are projected to increase their market size at a stable CAGR of XX% and XX%, respectively, for the period under study. In 2013, the LCV lighting market is estimated to be $XX million, which is anticipated to grow at a CAGR of XX% to reach $XX million in 2020.
5 AUTOMOTIVE LIGHTING MARKET, BY TECHNOLOGY

5.1 AUTOMOTIVE LIGHTING MARKET, BY TECHNOLOGY

FIGURE 5

AUTOMOTIVE LIGHTING MARKET SHARE (VALUE), BY TECHNOLOGY, 2013 VS 2020

Source: Industry Associations, Experts Interviews, and MarketsandMarkets Analysis

The halogen technology is estimated to have the largest share of automotive lighting with XX% and is projected to decrease to XX% by 2020. The LED technology is projected to have the second-largest share of XX% in 2013, which is estimated to increase to XX% by 2020. The automotive lighting market share of xenon/HID technology was about XX% in 2013 and is projected to increase to XX% by 2020.
5.1.1 EUROPE

5.1.1.1 Market Estimates (Volume), By Technology

**TABLE 3**

EUROPE: AUTOMOTIVE LIGHTING MARKET SIZE, BY TECHNOLOGY, 2011-2020 (`000 UNITS)

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<td>XX</td>
<td>XX</td>
<td>XX</td>
</tr>
<tr>
<td>Xenon/HID</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
</tr>
<tr>
<td>LED</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
</tr>
<tr>
<td>Total</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
</tr>
</tbody>
</table>

*e - estimated; p - projected

Source: OICA Statistics, Industry Associations, Experts Interviews, and MarketsandMarkets Analysis

As of 2013, the European LED lighting market is estimated to show the market demand of XX thousand units, which is projected to grow to XX thousand units in 2020 at the highest CAGR of XX% during the forecast period. Xenon/HID lighting is projected to reach XX thousand units by 2020 at a CAGR of XX%. In Europe, the halogen lighting is estimated to decline from XX thousand units in 2013 to XX thousand units by 2020, at a CAGR of XX%. The decline in the demand of halogen lighting is due to the increase in the usage of LED lighting, which is an energy-efficient source of lighting.
### 6 AUTOMOTIVE LIGHTING MARKET, BY GEOGRAPHY

#### 6.1 AUTOMOTIVE LIGHTING MARKET, BY GEOGRAPHY

#### 6.1.1 MARKET ESTIMATES (VALUE), BY GEOGRAPHY

**TABLE 4**

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Asia-Pacific</td>
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<td>XX</td>
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<tr>
<td>ROW</td>
<td>XX</td>
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<td><strong>Total</strong></td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
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</tbody>
</table>

*e- estimated; p- projected

Source: OICA Statistics, Industry Associations, Experts Interviews, and MarketsandMarkets Analysis

In 2013, automotive lighting market size in terms of value is estimated to be about $XX million and expected to increase to $XX million by 2020, at a CAGR of XX% during the same period.

Asia-Pacific had the largest market size in terms of value of $XX million followed by Europe with $XX in 2013. In 2020, the value in the Asia-Pacific region would increase to $XX million. However, the European region would increase to $XX million. The North American region is projected to show the third highest market after Europe, at a CAGR of XX%. ROW is anticipated to grow at a CAGR of XX% during the forecast period.
The market share for automotive lighting in the Asia-Pacific is estimated to increase slightly to XX% in 2020 from XX% in 2013. The market share in the European region is estimated to be XX% in 2013, which is anticipated to decrease to XX% in 2020. In North America, the market share is projected to increase from XX% in 2013 to XX% in 2020.
6.1.2  ASIA-PACIFIC

6.1.2.1  China, Japan, South Korea, and India: Top countries with major market share

6.1.2.1.1  South Korea

**TABLE 5**

**SOUTH KOREA: AUTOMOTIVE LIGHTING MARKET SIZE, BY TECHNOLOGY, 2011-2020 (’000 UNITS)**

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<tbody>
<tr>
<td>Halogen</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
</tr>
<tr>
<td>Xenon/HID</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
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</tr>
<tr>
<td>LED</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
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<tr>
<td>Total</td>
<td>XX</td>
<td>XX</td>
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</tr>
</tbody>
</table>

*e- estimated; p- projected

Source: OICA Statistics, Industry Associations, Experts Interviews, and MarketsandMarkets Analysis

The demand for halogen lighting in South Korea is estimated to be greater than that of xenon/HID and LED lighting. In the next seven years, the demand for halogen lighting is projected to increase from XX thousand units in 2013 to XX thousand units by 2020 at a steady CAGR of XX%. LED lighting is estimated to grow at the highest CAGR of XX%, whereas, the demand for xenon/HID lighting is projected to grow at a CAGR of XX% for the forecast period.
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