Much of the expected growth in OEM electronics demand derives from the continued substitution of electronic for mechanical vehicle systems.

Global demand to rise

7.1 percent annually through 2007

Worldwide demand for automotive electronics for original equipment manufacturers (OEMs) will increase to $56.5 billion in the year 2007, much more rapidly than vehicle production itself. Some electronics systems (such as electronic engine controls, transmission and fuel injection systems) are manufacturing in North America, Western Europe and Japan, and the industry is entering the next phase of evolution. Multifunction systems are being developed that coordinate the rapidly growing electric, safety, entertainment, and communications systems. Global electronics markets is being driven by the continued introduction of electronic systems designed to improve safety, efficiency and emissions control.

Safety, entertainment & power electronics to see best growth

The best growth in projects are emerg- ing in several market segments, such as safety electronics (seat belts, air bags, anti-lock brake systems and collision avoidance), entertainment electronics (digital video and audio systems), and power electronics (induction heating, electric vehicles and powertrain controls). The increased use of electronic systems continues to be driven by the need to reduce emissions and increase fuel efficiency, and the electronics demand derived from these systems is expected to increase in the future.

Developed nations continue to dominate demand

The developed nations of the world (the United States, Japan and many of the nations of Western Europe) will continue to account for the majority of demand for OEM auto electronics, some demand is linked directly to light vehicle production. Nevertheless, the trend toward electronics in parts of the vehicle continues to be driven by the need to improve performance.

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Much of the expected growth in OEM electronics demand derives from the continued substitution of electronic for mechanical vehicle systems.

Global demand to rise 7.1 percent annually through 2007

Worldwide demand for automotive electronics for original equipment manufacturer (OEM) use is forecast to advance 7.1 percent annually to $106 billion in the year 2007, much more rapidly than vehicle production itself. Some electronic systems (such as electronic engine controls, transmissions, and fuel injection system) are emerging in North America, Western Europe and Japan, and the industry is entering the next phase of evolution. Safety, entertainment, and communications systems are driven by the continued introduction of electronic systems designed to improve safety, efficiency and emissions control.

In certain high-value electronic content, current based demand for automotive electronics with projected steady advances in light vehicle production also contributing to growth – a trend that is especially relevant in emerging markets. Consumer usage of electronics is increasing across all vehicle segments, including heavy-duty equipment such as trucks. This is especially true of OEMs in Europe and Japan, who have invested in the development of electronic systems for the emerging markets. These systems have been designed to be manufactured in large volumes in the same facilities where mechanical systems were produced. Whether or not the demand will meet current expectations will depend on consumer acceptance of electronic systems in these markets.

Safet, entertainment, & power electronics to see best growth

The best growth in projected value will come in safety electronics and navigation systems for light vehicles. Safety electronics, which include airbag inflators, electronic stability (antiskid) systems, and safety communications, are expected to advance 14.6 percent annually to $33 billion in the year 2007. Business model expectations for the global navigation component market are revised downward in this report, from $7 billion to $5 billion. Demand is expected to grow 8.6 percent annually to $7 billion in 2007. Demand is forecast to remain flat through 2007 for other navigation options. There is expected to be little or no growth for GPS technology in the year 2007. Power electronics are expected to continue to grow at a strong rate as demand for hybrid electric vehicles increases.

Developed nations continue to dominate demand

The developed nations of the world (the United States, Japan and many of the nations of Western Europe) will account for the majority of demand for OEM auto electronics, some demand is linked directly to light vehicle production. Nevertheless, the trend to automate is not restricted to light vehicles. In fact, the use of electronic components to coordinate the rapidly growing electric systems, which are designed to handle and control a variety of systems, is a trend that will continue to grow. The drive to coordinate the rapidly growing electric systems, which are designed to handle and control a variety of systems, is a trend that will continue to grow. As a result, advanced products for automotive electronics will be the key areas of focus for automotive electronics manufacturers.

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Our World OEM Automotive Electronics study represents the culmination of several hundred hours of Freedonia analysts’ time. The study was authored by Lance Ealey, the head of Freedonia’s Automotive Division. Prior to joining our organization a year ago, Lance was a senior automotive analyst at McKinsey & Company and brought with him a wealth of knowledge and experience in the industry.

I invite you to add Lance and the Freedonia Group to your team by acquiring our World OEM Automotive Electronics study today.

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Freedonia Study #1691 - WORLD OEM AUTOMOTIVE ELECTRONICS

World Safety & Security Electronics Demand (in US dollars)

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World OEM Automotive Electronics Industry Study with Forecasts to 2007 & 2012

Much of the expected growth in OEM electronics demand derives from the continued substitution of electronic for mechanical systems.

Global demand to rise 7.1 percent annually through 2007

Worldwide demand for automotive electronics for original equipment manufacturer (OEM) uses (forecasts to US$75 billion in the year 2007) is much more rapidly than vehicle production itself. Some electronics systems (such as electronic engine controls, transmission and fuel injection systems) are mainstream in North America, Western Europe and Japan, and the industry is entering the next phase of evolution. Other electronics systems, which are designed to handle and manage complexity of newer vehicles, are being introduced in several market segments. The developed nations of the world (the United States, Japan and many of the nations of Western Europe) will continue to dominate demand for OEM auto electronics, some demand is linked directly to light vehicle production. Nevertheless, the trend to automate the vehicle production operations globally is likely to result in lower development and manufacturing cost, reduced transportation costs and lower labor costs. The geographic distribution of electronics demand is shifting, with Asia being the leading emerging region. In other words, related to new product designs is to find local vendors.

Safety, entertainment & power electronics to see best growth

The best growth prospects are emerging in several market segments. Entertainment electronics (such as navigation and telematics systems) are in the early phases of development, but have high potential for growth. Power requirements of newer vehicles, particularly safety (both active and passive safety systems), entertainment and communication systems, will increasingly cause a shift in the geographic distribution of electronics demand. The developed nations of the world (the United States, Japan and many of the nations of Western Europe) will continue to dominate demand for OEM auto electronics, some demand is linked directly to light vehicle production. Nevertheless, the trend to automate the vehicle production operations globally is likely to result in lower development and manufacturing cost, reduced transportation costs and lower labor costs. The geographic distribution of electronics demand is shifting, with Asia being the leading emerging region. In other words, related to new product designs is to find local vendors.

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