INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

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World OEM Automotive Electronics

Industry Study with Forecasts for **2014 & 2019**

Study #2728 | February 2011 | $6100 | 391 pages

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INDUSTRY STRUCTURE

Automotive electronics demand will be boosted in part by increasing regulatory pressure and the continued search among automakers for cost-effective ways to differentiate their products.

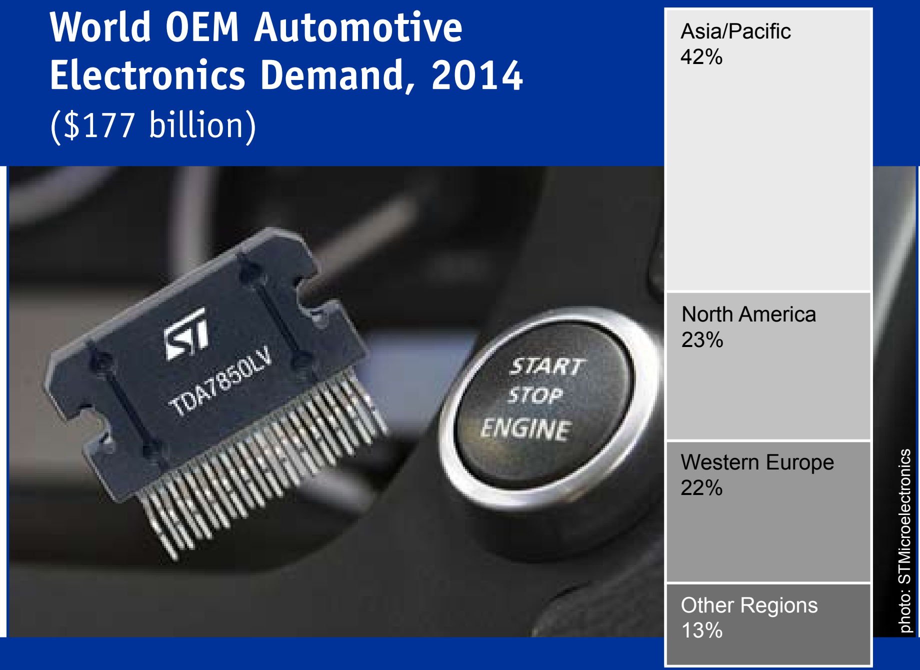
World demand to rise 12.4% yearly through 2014

In a rebound from depressed 2009 levels, global demand for light vehicle original equipment manufacturer (OEM) automotive electronics will advance 12.4 percent annually to $177 billion in 2014. Beyond the expected recovery from the 2009 recession, automotive electronics demand will be boosted by increasing regulatory pressure and the continued search among automakers for cost-effective ways to differentiate their products using electronic systems.

Emerging markets focus on basic electronics

Demand for OEM automotive electronics in developed markets is largely mature, with even mass-market vehicles featuring up to nine airbags, advanced electronic stability program (ESP) technologies and the latest entertainment systems. Emerging markets typically have more basic electronics needs and focus mostly on technologies that are now standard in developed countries. Examples include basic safety technologies such as standard airbags or antilock brake systems (ABS), powertrain and emissions applications like port fuel injection, and closed-loop catalytic converter systems. Another growing dynamic in many emerging markets is demand for comfort, convenience and entertainment offerings such as power windows, door locks and powerful audio heads, all of which car buyers value for their visible status.

World OEM Automotive Electronics Demand, 2014
($177 billion)



Communication, navigation electronics to record most rapid sales increases

Safety and security electronics will register a strong increase in demand through 2014, as more advanced safety features percolate down into mass market vehicles. Powertrain and emissions electronics will also post solid gains, driven by stringent new fuel economy and emissions standards in developed markets, particularly the US and Western Europe. Growing from a small base, communication and navigation electronics will record the most rapid sales increases as more OEMs integrate these handy technologies into their vehicles. Instrumentation and comfort, convenience and entertainment electronics will have lower but still attractive growth rates as more emerging market players install these features in their vehicles to meet customer demand.

In developed automotive markets, the coming decade is rapidly shaping up to be one focused on expanding the driver's capabilities to react to events or to see further and anticipate more fully any potential challenge ahead on the roadway, and electronics technologies are slated to play major roles. However, in the medium term, a new focus on frugality in these markets could reduce interest in the latest OEM automotive electronics applications.

World OEM Automotive Electronics

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Sample Text, Table & Chart

TABLE VI-3

JAPAN: MACROECONOMIC ENVIRONMENT

Item	1999	2004	2009	2014	2019
Population (million persons)					.6
GDP/capita	3				10
Gross Domestic Product (bil 2008$)					50
light vehicle sales/mil $ GDP					96
Light Vehicle Sales (000)					75
+ net exports/sales from inventories					50
Light Vehicle Production (000)	9				25

SAMPLE TABLE

US and the major West European auto producing coun-
per-vehicle electronic content in Japan-produced light
een among the highest in the world, and the domestic
s now mature. Japanese vehicles routinely incorporate
ures such as antilock brakes, airbags, cruise control,
ostic systems, instrument clusters, keyless entry, electronic
and the like. In addition, Japan has increasingly become
ring center for luxury and performance vehicles that are
e world, thus increasing the overall electronics content
oduced in the country. Light vehicles produced in Japan
are routinely available with sophisticated items such as trip computers, intelligent navigation systems, automatic temperature controls, voice-activated systems, pedestrian and obstacle detection systems, cellular telephones, advanced autosound systems, and many other electronic technologies. These features rely on electronics systems to operate.

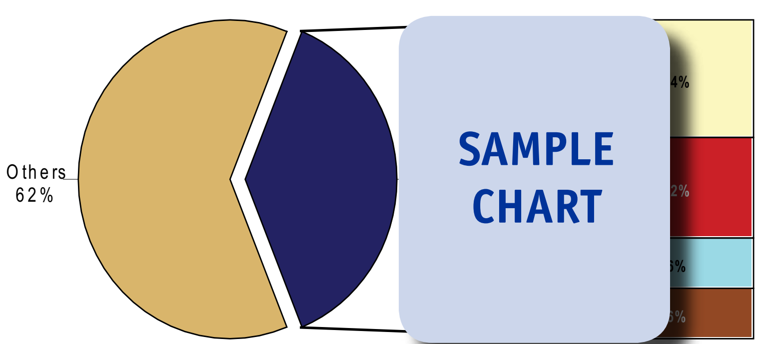
Demand for powertrain and emissions electronics in Japan will
grow billion in 2014, driven in part by ve-
hicle and other countries. Lower growth
rates natures of many of the electronics
used plications, as well as the abilities of
OEM reduce the costs of these electronics.
On th rowth in this area remains relatively
healthy Ms have transplanted vehicle assembly outside of Japan, they have typically continued to produce highline and luxury cars at home due to concerns regarding quality and lower profitability issues compared to smaller vehicles. Furthermore, Honda, Nissan and Toyota build many of their HEVS, PHEVs and BEVs in Japan, and these vehicles feature significant levels of powertrain electronics.

tomotive electronics in Japan will
illion in 2014. Advances will

SAMPLE TEXT

CHART VIII-1

WORLD OEM AUTOMOTIVE ELECTRONICS MARKET SHARE
($98.6 billion, 2009)



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Sample Profile, Table & Forecast

TABLE VI-4

JAPAN: OEM AUTOMOTIVE ELECTRONICS DEMAND (million dollars)

Item	1999	2004	2009	2014	2019
Light Vehicle Production (000)					
$ auto electronics/vehicle					
OEM Automotive Electronics Dmnd					
Powertrain & Emissions					
Safety & Security					
Comfort, Convenience & Entertain					
Instrumentation					
Communication & Navigation					
% Japan					
Asia/Pacific OEM Automotive Electronics	18000	28100	43000	75000	119400

SAMPLE TABLE

COMPANY PROFILES

Microsoft Corporation
1 Microsoft Way
Redmond, WA 98052
425-882-
http://w

Sales: $
Geograp US 58% and Other
Countrie
Employ

Key Pro

SAMPLE PROFILE

Microsoft develops, manufactures, licenses, markets and supports a wide range of software products for computing devices. The Company also develops and manufactures certain hardware products, including video game consoles and digital music and entertainment devices, and provides consulting and product support services. Microsoft operates through six segments: Windows and Windows Live, Server and Tools, Online Services, Microsoft Business, Entertainment and Devices, and Unallocated and Other.

The Company is active in the world OEM automotive electronics industry through the Entertainment and Devices segment, which had FY 2010 sales of $8.1 billion. The segment develops, produces and markets a range of entertainment consoles; games; consumer software and hardware; and mobile device software, operating systems and platforms. Among its products is the WINDOWS AUTOMOTIVE software platform, which is designed to control in-vehicle communications, entertainment, navigation and other electronic features. This platform incorporates MICROSOFT TELLME speech technology, a speech recognition technology that enables drivers to access directions,

346

"Consumption of OEM automotive electronics in Japan will increase 9.5 percent annually to $26.9 billion in 2014, accounting for 36 percent of total regional demand -- a continuing drop as new players such as China ramp up automotive production. Most of the expected growth will result from a market rebound from the global economic recession. Also providing gains will be the continued increase in electronics content per-vehicle, especially in ..."
--Section VI, pg. 161

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Other Studies

Advanced Lighting

This study analyzes the US advanced lighting industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by product (e.g., halogen lamps, LEDs, HIDs, specialty fluorescent lamps), end use market (e.g., residential buildings, nonresidential buildings, motor vehicles, street lighting, consumer electronics) and US regional market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2743 .... April 2011 .... $4900

Advanced Flat Glass

US advanced flat glass demand will rise 11.6 percent annually through 2014, driven by a rebound in residential construction and motor vehicle production. Consumption will also benefit from increasing market penetration of low-emissivity glass, heads-up display windshields, electrochromic mirrors, smart glass and other products. This study analyzes the $4.1 billion US advanced flat glass industry, with forecasts for 2014 and 2019 by type and market. It also evaluates company market share and profiles industry competitors.

#2674 .... December 2010 .... $4800

World Automotive Sensors

Global demand for light vehicle OEM automotive sensors will advance 11.8 percent annually through 2014. North America will be the fastest growing region, far outpacing the Asia/Pacific and other regions based on a rebounding US market and higher per-vehicle sensor revenues. This study analyzes the $9.1 billion world automotive sensor industry, with forecasts for 2014 and 2019 by product, world region and for 23 countries. It also evaluates company market share and profiles industry participants.

#2640 .... June 2010 .... $5700

Automotive Aftermarket in China

The automotive aftermarket in China will grow 18.3 percent yearly through 2014, driven by the country's expanding and aging stock of light vehicles. Mechanical products will remain the most common types, while electronics grow the fastest. Low-speed vehicles will continue to be a key aftermarket in rural areas. This study analyzes the 71 billion yuan automotive aftermarket in China, with forecasts for 2014 and 2019 by product and service performer. It also evaluates company market share and profiles industry participants.

#2621 .... March 2010................... $5300

Automotive Aftermarket in North America

The aftermarket for light vehicle components in North America will increase 2.9 percent annually through 2014. Mechanical products will remain the largest category while electronics grow the fastest. The dominant professional service provider segment will outpace the DIY market. This study analyzes the $66 billion automotive aftermarket in North America, with forecasts for 2014 and 2019 by country (US, Canada, Mexico) and product. It also evaluates company market share and profiles industry participants.

#2606 .... March 2010................... $4800

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