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# World OEM Automotive Electronics

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

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

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*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)



Asia/Pacific  
42%

North America  
23%

Western Europe  
22%

Other Regions  
13%

photo: STMicroelectronics

## 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.

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## Sample Text, Table & Chart

**TABLE VI-3**

**JAPAN: MACROECONOMIC ENVIRONMENT**

Item	1999	2004	2009	2014	2019
Population (million persons)					126
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)					25

**SAMPLE TABLE**

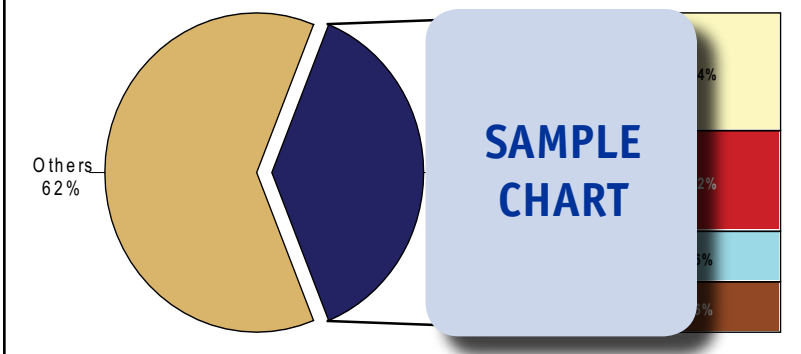
US and the major West European auto producing countries. Japan's per-vehicle electronic content in Japan-produced light vehicles has been among the highest in the world, and the domestic market is now mature. Japanese vehicles routinely incorporate electronic features such as antilock brakes, airbags, cruise control, navigation systems, instrument clusters, keyless entry, electronic parking brakes and the like. In addition, Japan has increasingly become a leading center for luxury and performance vehicles that are produced in the world, thus increasing the overall electronics content of vehicles produced 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 to \$1.5 billion in 2014, driven in part by vehicle production in Japan and other countries. Lower growth rates are expected due to the mature nature of many of the electronics used in these applications, as well as the abilities of OEMs to reduce the costs of these electronics. On the other hand, growth in this area remains relatively healthy as OEMs 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.

**SAMPLE TEXT**

**CHART VIII-1**

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



**SAMPLE CHART**

Automotive electronics in Japan will reach \$1.5 billion in 2014. Advances will

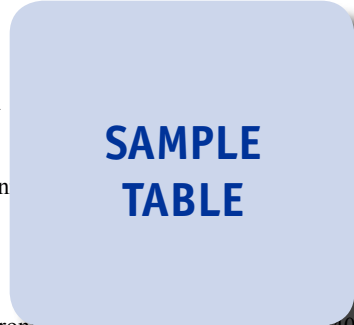
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## Sample Profile, Table & Forecast

**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	10000281004300073000119400				



**COMPANY PROFILES**

**Microsoft Corporation**  
 1 Microsoft Way  
 Redmond, WA 98052  
 425-882-5000  
 http://www.microsoft.com

Sales: \$10.1 billion in 2010  
 Geograph: US 58% and Other  
 Countries: US, Canada, Europe, Asia, Latin America  
 Employees: 220,000

**Key Products:** Windows, Office, Xbox, Surface, Bing, Dynamics, Azure, LinkedIn, Skype, OneDrive, Office 365, Windows Phone, Windows RT, Windows 8, Windows Server, Windows Embedded, Windows IoT, Windows Holographic, Windows Mixed Reality, Windows Defender, Windows Firewall, Windows Security, Windows Update, Windows Defender Security Center, Windows Defender SmartScreen, Windows Defender Application Guard, Windows Defender Credential Guard, Windows Defender Device Guard, Windows Defender Network Protection, Windows Defender SmartScreen, Windows Defender Application Guard, Windows Defender Credential Guard, Windows Defender Device Guard, Windows Defender Network Protection.

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,

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“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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