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Automotive lighting : SSL technologies enable the development of new functionalities

Extracted from: Automotive Lighting: Technology, Industry and Market Trends 2017 report – Yole Développement, October 2017

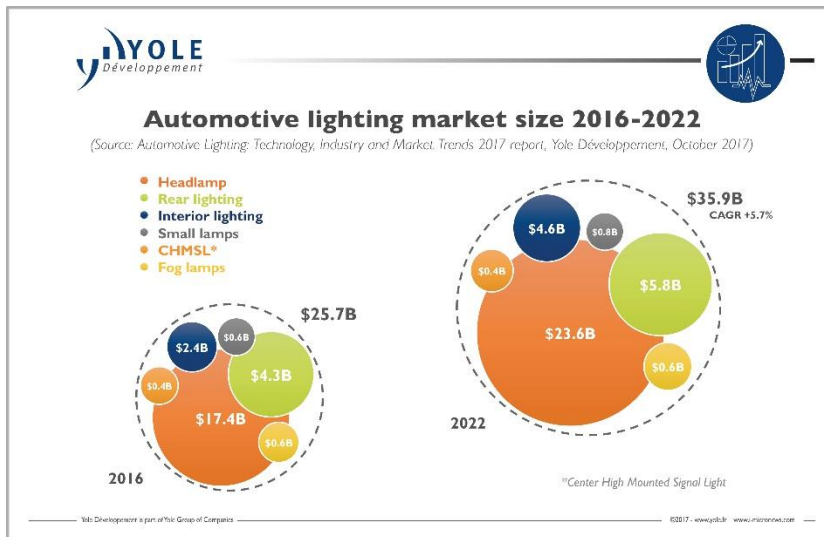
LYON, France – October 9, 2017: The automotive lighting market totaled US\$25.7 billion in 2016 and is expected to reach US\$35.9 billion in 2022, with a 5.7% CAGR¹ between 2016 and 2022. In 2017, [Yole Développement \(Yole\)](#) estimates that the market should be close to US\$27.7 billion.

This growth is driven by natural LED cost erosion, increasing the LED penetration rate. Standardization of LED modules and their optimization are key factors behind decreasing costs. This has resulted in more vehicles equipped with LED technology.

The market research and strategy consulting company Yole proposes today a detailed analysis of the automotive lighting industry: [Automotive Lighting: Technology, Industry and Market Trends 2017](#).

This new report presents all automotive lighting applications and associated market revenue between 2013 and 2022. Yole’s analysts

detail the integration status of different lighting technologies and systems, technical trends, market evolution and market size by application. The automotive lighting is facing to an unexpected fast growth combined with technology revolution that will reshape the industry.



Since the first full LED² headlamp was introduced in 2007, LED technology has gradually penetrated headlamp design. LED technology has allowed lighting to become a distinctive feature and enabled innovative functions like the glare free adaptive high beam introduced in 2013.

¹ CAGR : Compound Annual Growth Rate

² LED : Light-Emitting Diode

LED technology use had been limited to high-end vehicles and has had to compete with traditional light sources, namely halogen and high-intensity discharge (HID/Xenon). Improved LED performance, lower power consumption and flexible design were the first enablers. Then, cost reductions helped LED technology spread to all vehicle categories.

Automotive lighting is driven by exterior lighting and especially headlamps, generating more than two-thirds of the total market revenue. Rear lighting is the second largest area, representing 17% of total market revenue. Interior lighting represents almost 10% of revenue but growth is expected to be linked to the development of autonomous vehicles and the creation of vehicles as «living homes». Other types of lighting, such as fog lamps, CHMSL³ or small lamps, comprised the remaining 7% of revenue in 2016.

*“More than 100 million vehicles will be sold in 2022, but this has only a limited impact on the lighting market”, comments **Pierrick Boulay, Technology & Market Analyst at Yole**, in his article published on i-micronews: [The automotive lighting industry will be worth \\$36B in 2022](#). He adds: “The main reason for lighting growth is that the penetration of LED technology is spreading from high-end cars to mid-range and low-end cars. LED technology propagation and more generally SSL⁴ technologies will enable the development of new functionalities.”*

Yole’s analysts offer you today a comprehensive overview of this industry, its challenges, its supply chain and key figures. Automotive lighting industry is clearly showing remarkable technical advances including emerging technologies based on microLEDs, LCDs and lasers, explain the consulting company in this report. AFLS⁵ architecture and interaction with sensors are also part of this evolution and well described.

Chinese automotive lighting industry, Non-visible lighting systems such as IR & UV emitters used for automotive applications and more: a detailed description of this technology & market report is available on [i-micronews.com, LED reports section](#).

Yole will attend [ForumLED 2017](#) (Dec. 13 & 14, 2017 – Lyon, France). Meet Yole’s experts onsite and attend the session chaired by **Pars Mukish, Business Unit Manager at Yole**: “The market for LED lighting: State of the art & market trends” on December 13 at 11:00 AM. [Agenda & registration](#) are now available.

³ CHMSL : Center High Mounted Signal Light

⁴ SSL : Solid State Lighting

⁵ AFLS : Advanced Front Lighting System



About [Automotive Lighting: Technology, Industry and Market Trends 2017](#) report:

Unexpectedly fast growth combined with technology evolution could reshape the industry - Produced by Yole Développement (Yole) part of Yole Group of Companies.

■ Companies cited in the report:

3M, Abarth, Acura, Alfa Romeo, AMG, Apple, Aston Martin, Audi, Autoliv, Automotive Lighting, Avago, Avis, Basf, Bentley, BlaBlaCar, BMW, Bolloré, Bosch, Brightek Optoelectronic, Bugatti, Buick, BYD, Cadillac, Chevrolet, Chrysler, Cisco, Citizen Electronic, Citroen, Clean Technology Leader, CML Innovative Technologies, CnLight, Continental, Covestro, Cree, Dacia, Daihatsu, Daimler, Datsun, Delphi, Denso, Depo Auto Parts, Dodge, Dominant, Dupont, Edison, EFI Lighting, Elmos Semiconductor, Everlight, FCA, Ferrari, Fiat, Ford, Fraunhofer, Freescale, Fujitsu, Geely, General Motors, GMC, Grupo Antolin, Hamamatsu, Harman, Harvatek, Hella, Hokuyo, Holden, Honda, Honglitrionic, Hyundai, Ibeo, IBM, Ichikoh, Infineon, Infiniti, Inova Semiconductor, Itswell, Jaguar, Jeep, Kandi, Kia, Kodensh... [Full list](#)

■ Author

Pierrick Boulay works as Market and Technology Analyst in the fields of LED, OLED and Lighting Systems to carry out technical, economic and marketing analysis at Yole Développement, the “More than Moore” market research and strategy consulting company. He has experience in both LED lighting (general lighting, automotive lighting...) and OLED lighting. In the past, he has mostly worked in R&D department for LED lighting applications. Pierrick holds a master degree in Electronics (ESEO - France).



About Yole Développement – www.yole.fr

Founded in 1998, Yole Développement has grown to become a group of companies providing marketing, technology and strategy consulting, media and corporate finance services. With a strong focus on emerging applications using silicon and/or micro manufacturing, the Yole Développement group has expanded to include more than 50 collaborators worldwide covering MEMS,

Compound Semiconductors, RF Electronics, Solid-state lighting, Displays, Image Sensors, Optoelectronics, Microfluidics & Medical, Advanced Packaging, Manufacturing, Nanomaterials, Power Electronics and Batteries & Energy Management.

The “More than Moore” company Yole, along with its partners System Plus Consulting, PISEO, Blumorpho and KnowMade, support industrial companies, investors and R&D organizations worldwide to help them understand markets and follow technology trends to grow their business.

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