

Automotive interior: please take a seat in a high-tech living room...¹

OUTLINE:

- C.A.S.E paradigm: connectivity, autonomy and sharing megatrends are changing car interiors. And behind, sensing, lighting and displays are playing a key role.
- Market figures and trends:
As a key segment for electronics and semiconductor industry, the automotive interior market will reach more than US\$22 billion by 2025.
The in-cabin sensing market is showing one of the highest growths until 2025, with a 56% CAGR² to reach almost US\$3 billion in 2025.
Yole Développement (Yole) expects the interior lighting market to increase 45%, from about US\$3 billion in 2020 to almost US\$5 billion in 2025.
- COVID-19 outbreak:
The COVID-19 crisis' impact on vehicle sales will not be felt as much by the interior lighting market since there is increased content in newer cars.
Same trend can be observed in automotive displays
- Competitive landscape and supply chain:
OEMs are trying to differentiate themselves through advanced personalization levels: including more displays, removing buttons, fine-tuning interior lighting and so on
The timelines for consolidation will differ from OEM³ to OEM, with ADAS⁴ and cockpit consolidations happening independently.

*“Automotive interior enhancement is becoming a key segment for electronics and semiconductor industries.” asserts **Pierrick Boulay, Solid State Lighting and Lighting Systems within the Photonics, Sensing & Display division at Yole Développement (Yole)**. “Following the aforementioned regulation trends, the in-cabin sensing market will observe the*

¹ Extracted from: [Automotive Interior - From Lighting to Sensing and Display Technologies 2020](#), Yole Développement, 2020

² CAGR: Compound Annual Growth Rate

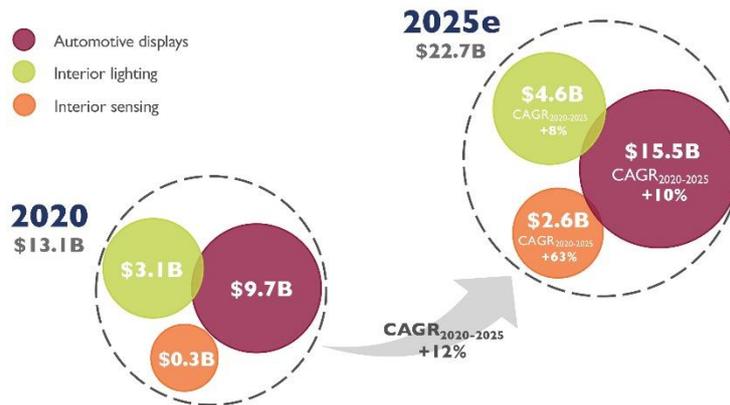
³ OEM: Original Equipment Manufacturers

⁴ ADAS: Advanced Driver Assistance System

highest CAGR until 2025, at 63%. This segment will reach US\$2.6 billion in 2025, with driver monitoring systems representing 73% of this revenue”.

2020-2025 global interior market revenue forecast (\$B)

(Source: Automotive Interior - From Lighting to Sensing and Display Technologies 2020 report, Yole Développement, 2020)



In this context, the market research & strategy consulting company investigates disruptive sensing, lighting & display technologies. Its aim is to point out the latest innovations and underline the business opportunities.

Released today, the Automotive Interior - From Lighting to Sensing and Display Technologies 2020 report provides a comprehensive overview of the Sensing – Lighting – Display technologies that are currently used or under development for interior car applications. This new analysis delivers a detailed description of the industry, with relevant market data on key in-cabin applications like sensing, lighting, and displays. It provides an in-depth understanding of the competitive landscape with a detailed analysis of the in-cabin value chains, players and their strategies and trends. Including market trends, revenues and forecasts, supply chain, technology trends, challenges and technical roadmaps, key technical insights and analysis regarding future technology trends and challenges, Yole’s automotive study also underlines the E/E architecture of a car.

What are the economic and technological challenges? From sensing to lighting, including display, what are the most important expected growths? What is the status of the competitive landscape? Who are the most innovative players to watch? What are the supply chains per applications?

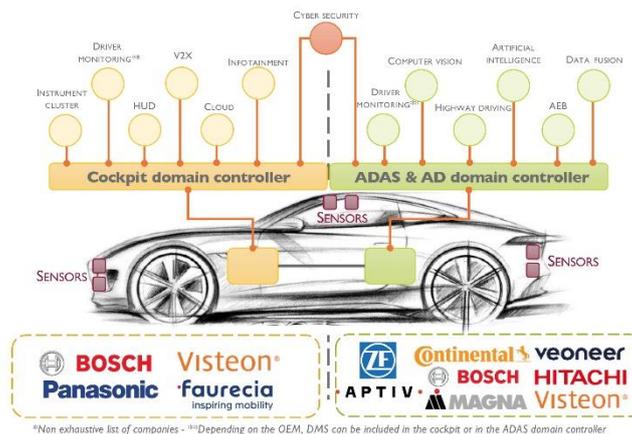
Yole has combined its extensive sensing, lighting, and display expertise to presents today its vision of the automotive interior industry.

As analyzed by Yole’s team in the new Automotive Interior - From Lighting to Sensing and Display Technologies 2020 report, there is clearly general trend that has been going on for many years, helping the OEMs to personalize their interiors.

That is the interior lighting market, which will increase 45%, from US\$3.1 billion in 2020 to US\$4.6 billion in 2025 at a CAGR of 8%. The COVID-19 crisis' impact on vehicle sales will not be felt as much by the interior lighting market since there is increased content in newer cars. The same trend can be observed in automotive displays. Clusters have been digitizing, infotainment systems have been going the full flat-panel display route, and all that while observing an increased average panel size, bringing market value to US\$15.5 billion by 2025. Of course, LCDs will keep dominating the market but emerging technologies like miniLED and microLED displays will gain share, reaching 13% penetration rate in interior displays by 2025. *“And alongside regular displays for clusters, mirrors, or infotainment systems, we shall expect microdisplays to be increasingly adopted rate through augmented reality HUDs,”* comments Pierrick Boulay from Yole. *“This will allow for a secure and comfortable solution for drivers.”*

Players involved in domain controllers*

(Source: Automotive Interior - From Lighting to Sensing and Display Technologies 2020 report, Yole Développement, 2020)



The automotive industry has been taken over by the C.A.S.E paradigm: Connected, Autonomous, Shared and Electrical. And in that context, the connectivity, autonomy and sharing megatrends are changing car interiors. This can be traced back to two major industry drivers: improving safety while improving comfort. Though this may appear to be a dichotomy, this can all actually be linked within the car interior. Both comfort and safety are fed by displays, interior lighting, gesture recognition, particle monitoring and monitoring systems in general, be it for drivers or passengers.

According to **Martin Vallo, PhD, Technology & Market Analyst specialized in solid-state lighting technologies, within the Photonics, Sensing & Display division at Yole:** *“By 2022 in Europe and 2024 in the United States, driver monitoring systems are expected to become mandatory, as the level of distractions felt by a driver has reached a climax. Phone conversations, texting, emailing, watching movies and so many different elements that have helped increase the comfort for drivers, as well as their passengers”.*

Driver monitoring systems will be also necessary for advanced automated driving features, to take control from and return it to the driver. They will also avoid misuses of such functions like Tesla's users misuse of the Autopilot feature. As the industry moves towards more advanced levels of autonomy, driver needs and the car's environment have been pushing the boundaries, bringing us more advanced interior designs. And the automotive OEMs are trying to differentiate themselves through advanced personalization levels. This includes adding displays, removing buttons and fine-tuning interior lighting. Bringing us to an automotive cockpit that can be as much an entertainment zone as it can be a working zone. This completely brings the living room to the car.

But as with the home, how can the car user interact with all these elements, ensuring as ergonomic a user experience as possible?

All year long, Yole Développement publishes numerous technology & market reports and monitors related to sensing, display and lighting. In addition, experts realize various key presentations and organize key conferences. In this regard, do not miss the AutoSens Detroit 2020 world-class conference from November 17 to 19, 2020, in Detroit, MI, USA. Pierrick Boulay from Yole Développement will participate in the "Competing Radar Technologies Review".

Make sure to be aware of the latest news coming from the industry and get an overview of our activities, including interviews with leading companies and more on i-Micronews. Stay tuned!

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About our analysts

As part of the Photonics, Sensing & Display division at Yole Développement (Yole), **Pierrick Boulay** works as Market and Technology Analyst in the fields of Solid State Lighting and Lighting Systems to carry out technical, economic and marketing analysis. Pierrick has authored several reports and custom analysis dedicated to topics such as general lighting, automotive lighting, LiDAR, IR LEDs, UV LEDs and VCSELs. Prior to Yole, Pierrick has worked in several companies where he developed his knowledge on general lighting and on automotive lighting. In the past, he has mostly worked in R&D department for LED lighting applications. Pierrick holds a master degree in Electronics (ESEO – Angers, France).

Martin Vallo, PhD serves as a Technology & Market Analyst specialized in solid-state lighting technologies, within the Photonics, Sensing & Display division at Yole Développement (Yole). With 9 years' experience within semiconductor technology, Martin is involved today in the development of technology & market reports as well as the production of custom consulting projects at Yole. Prior his mission at Yole, he worked at CEA (Grenoble, France), with a mission focused on the epitaxial growth of InGaN/GaN core-shell nanowire LEDs by MOCVD and their characterization for highly flexible photonic devices. Martin graduated from Academy of Sciences, Institute of Electrical Engineering (Slovakia) with an engineering degree in III-nitride semiconductors.

As a Technology & Market Analyst, Displays, **Zine Bouhamri, PhD** is a member of the Photonics, Sensing & Display division at Yole Développement (Yole). Zine manages the day to day production of technology & market reports, as well as custom consulting projects. He is also deeply involved in the business development of the Displays unit activities at Yole. Previously, Zine was in charge of numerous R&D programs at Aledia. During more than three years, he developed strong technical expertise as well as a detailed understanding of the display industry. Zine is author and co-author of several papers and patents. Zine Bouhamri holds an Electronics Engineering Degree from the National Polytechnic Institute of Grenoble (France), one from the Politecnico di Torino (Italy), and a Ph.D. in RF & Optoelectronics from Grenoble University (France).

Eric Virey, PhD., serves as a Principal Display Market and Technologies Analyst within the Photonics, Sensing & Display division. Eric has spoken in more than 50 industry conferences over the last 10 years and has been interviewed or quoted in multiple media including: The Wall Street Journal, CNN, Fox News, CNBC, Bloomberg, Financial Review, Forbes, Technology Review, etc. Prior to joining Yole, Eric held R&D, engineering, manufacturing and marketing positions with Fortune 500 Company Saint-Gobain in France and the United States. Eric received a PhD in Optoelectronics from the National Polytechnic Institute of Grenoble. He is based in Portland, OR.

About the report

Automotive Interior - From Lighting to Sensing and Display Technologies 2020

Automotive interior enrichment is becoming a key market segment for electronic and semiconductor industries. – Performed by Yole Développement

Companies cited:

Acer, Aisin Seiki, Aledia, Analog Devices, Apple, Aptiv, ASTI, Audi, AUO, BHAP, BMW, BOE , Bosch, Bose, Continental, Denso, Dräxlmaier, Everlight, Eyesight, Faurecia, Federal-Mogul, Fiat, Flex (AGM Automotive), Ford, Garret Advancing Motion, Geely, Gentex, GlobalFoundries , GM, Goertek, Groupe Tera, Grupo Antolin, Hannstar, Harman, Hella, Honda, Huayu Vision Technology, Hyundai, Hyundai Mobis, Infiniti, Innolux, Intel, Invensas, ITRI, Jaguar, JB Display, JDI, Joyson Safety Systems, Karma, Kia, Koito, Kostal, Kyocera, Land Rover, LETI, Lextar, Lexus, LG Display, Lumens, Lumileds, Lumiode, Magna, Marelli, Melco Display, Melexis, Mercedes-Benz, Micledi, Mitsubishi, Mitsubishi Electric Corp., Mojo Vision, Monolithic 3D, Müller-BBM, Nissan, Omnivision, OnSemiconductor, Osram, Ostendo, Panasonic, Paragon, Plessey, PSA, Recticel, Renault, Samsung, Seat, Seeing Machines, Sensirion, Sharp, Smart Eye, Sony, Stanley, Stmicroelectronics, Sun Yat Sen U., SUSTech, Suzuki,

Syndiant, TE Connectivity, Tesla, Tianma, Toyoda Gosei, Toyota, Truly, Valeo, Veoneer, Vishay, Visionox, Visteon, Volkswagen, Volvo, Vuereal, Xingyu, Xperi, Yanfeng, Yazaki and more...

Related reports:

- [Sensing and Computing for ADAS Vehicle 2020](#)
- [Microdisplays – Market, Industry and Technology Trends 2020](#)
- [Status of the Radar Industry: Players, Applications and Technology Trends 2020](#)
- [LG Electronics Cluster and Infotainment Display Module in the Mercedes-Benz A-Class](#)
- [LiDAR for Automotive and Industrial Applications 2020](#)

About Yole Développement

Founded in 1998, Yole Développement (Yole) has grown to become a group of companies providing marketing, technology and strategy consulting, media and corporate finance services, reverse engineering and reverse costing services and well as IP and patent analysis. With a strong focus on emerging applications using silicon and/or micro manufacturing, the Yole group of companies has expanded to include more than 80 collaborators worldwide... [More](#)

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