Automotive Washer System Market: Passenger Cars Vehicle Type Segment Anticipated to Be the Most Lucrative Market Segment: Global Industry Analysis and Opportunity Assessment, 2016-2026

Description:
Automotive washer system is an important part of vehicle safety system and ensures clear vision of other vehicles on road so as to avoid possibilities of accident. Windshield washer system is a basic safety feature available as an inbuilt feature in passenger cars, light and heavy commercial vehicles manufactured across the globe. On the other hand, headlamp washer system is more a feature of premium, luxury and SUV car segment, it ensures proper cleaning of headlamp against mud and dirt thus maintaining proper intensity of light.

In some regions such as Eastern Europe, Western Europe and parts of North America, it is mandatory for vehicles using high intensity discharge (HID) headlights to deploy headlamp washer systems. The segment sales of washer systems includes all standard components found in a vehicle with headlamp washer system and windshield washer system, i.e. headlamp wash nozzle/camera wash nozzle, windshield wash nozzle, fluid reservoir, hose and connectors, wiper blade, wiper arm, windshield washer pump and front & wiper motor.

The global automotive washer system market is expected to register a value CAGR of 5.4% over the forecast period (2016-2026) and reach a value of US$ 29.6 Bn by end of 2026.

Increasing sales of new vehicles and a strong aftermarket demand for washer system components is fuelling the sales of global automotive washer system market.

The growth of the global automotive washer system market is primarily attributed to increasing sales of new vehicles and strong aftermarket demand for washer system components. The global automotive aftermarket is projected to be valued at US$ 1.2 Tn by 2020, witnessing a CAGR of 3.9% over 2016-2020.

Additional cost of new wiper technologies is anticipated to moderately hamper market growth, as customer base particularly in developing economies are reluctant to invest in newer and high priced technologies.

Some of the prominent trends assessed in the global automotive washer system market are smart integration of technologies, increasing application of rear camera washer systems, increasing adoption of headlamp washer systems in semi-luxury and mid-sized cars and advancements in wiper blade and nozzle design.

Furthermore, significant opportunities exists for washer system manufactures through expansion in developing economies. Recent vehicle recalls due to supply of faulty washer system and regulations mandating use of headlamp washer systems will create significant pressure on supply side to develop cost-efficient, durable and reliable washer systems, so as to win market share.

Market Segmentation

By Component
- Nozzles
- Reservoirs
- Hose & Connectors
- Pumps
- Windshield
- Wipers
- Wiper Motor

By Technology
- OEM
- Aftermarket
The windshield wipers segment is expected to account for a dominant volume share throughout the forecast period as they have a strong aftermarket demand.

On the basis of component, windshield wipers are expected to account for a dominant volume share throughout the forecast period. Windshield wipers have significant demand from the aftermarket as it have relatively higher replacement rate. The segment is expected to register a volume CAGR of 4.4% over the forecast period. In terms of value, wiper motor segment is expected to maintain dominance throughout the forecast period. The segmented is expected to be valued at US$ 13.1 Bn by end of 2026, registering a value CAGR of 5.0% between 2016 and 2026. Pumps and reservoir segments are expected to witness a moderate CAGR growth over the forecast period.

The passenger car segment is expected to be most lucrative and create highest incremental $ opportunity over the forecast period.

On the basis of vehicle type, passenger car segment is expected to be most lucrative and create highest incremental $ opportunity over the forecast period. The segment is estimated to account for 74.5% of the total revenue generated in 2016. The LCV segment is anticipated to witness relatively slower CAGR growth between 2016 and 2026 as compared to passenger car and HCV.

Headlamp washer system is anticipated to witness fast growth and register a value CAGR of 8.3% over the forecast period.

On the basis of application, windshield washer system is expected to maintain dominance both in terms of value and volume over the forecast period. However, headlamp washer system is anticipated to witness faster growth and exhibit a value CAGR of 8.3% compared to 4.5% of windshield washer system, over the forecast period.

The electrical segment held 87.1% value share in 2015 and is expected to remain dominant over the forecast period.

By technology, the mechanical washer system is expected to witness decline in growth rate over the forecast period. The electrical segment held 87.1% value share in 2015 and is expected to remain dominant over the forecast period.

The APEJ regional market is expected to lead the global market with an estimated share of 31.6% in 2016.

The research report on automotive washer systems includes in-depth analysis of washer system market in key regions including North America, Latin America, Asia Pacific excluding Japan, Western Europe, Eastern Europe, Japan and Middle East and Africa. Asia Pacific excluding Japan is expected to lead the market with an estimated share of 31.6% in 2016 and 38.0% in 2026. However, regions such as North America is anticipate to lose significant basis point share over the forecast period owing to ongoing shift of vehicle production
facilities to Brazil, Mexico and developing nations of Asia Pacific. Innovation and new product development is expected to be the key focus of major players in the Western and Eastern European region. Middle East and Africa region is expected to hold minimal share over the forecast period.

Automobile manufacturers are expected to prefer locally sourced components for economical pricing and sustainable supply.

The competitive landscape section covers financials, key developments and strategies adopted by key players in the global automotive washer system market. Some of the key players are Robert Bosch GmbH, Denso Corporation, Valeo SA, Continental AG, HELLA KGaA Hueck & Co., Ningbo Joyson Electronic Corp, Mitsuba Corporation, Mergon Group, Trico Products Corporation and Kautex Textron GmbH & Co. KG.

Automobile manufacturers are expected to prefer locally sourced components for economical pricing and sustainable supply, therefore benefitting domestic washer system manufacturers. Furthermore, international players could leverage their capabilities to expand into such markets through collaborations with local players.

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