

TSR - Press Release

An Era of Supervision Cluster to Emerge in Automotive Market

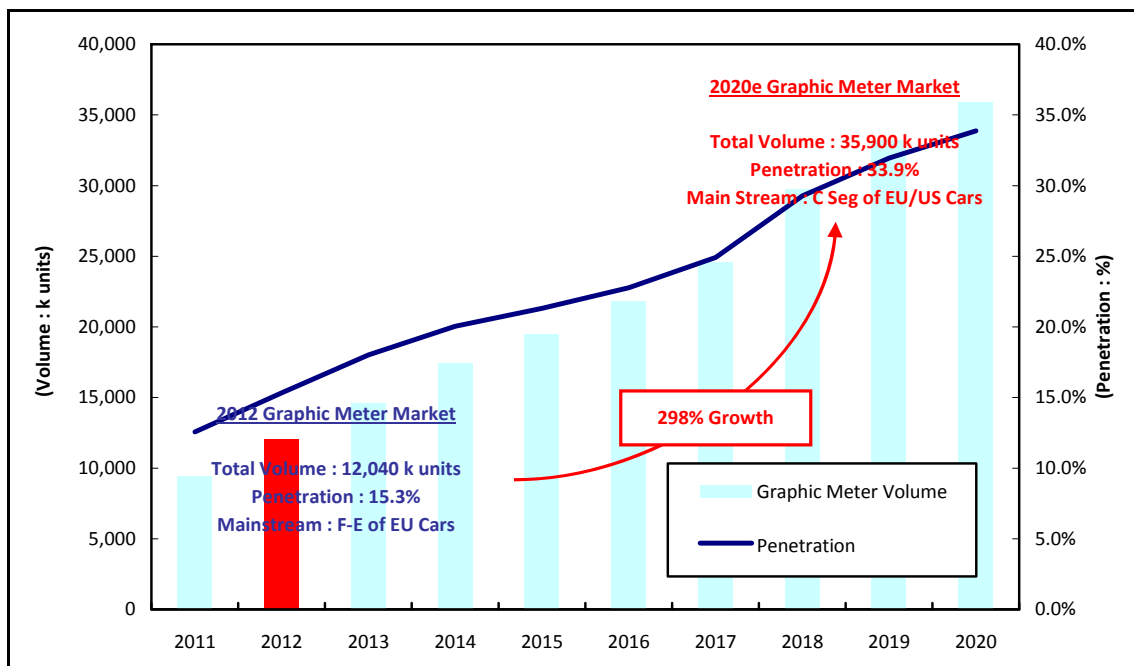
= Expanding Supervision Cluster Using Active LCD =

Approx. 300% Increase of Market Size in 2020 with 35,900k units from 12,040k units in 2012

Techno Systems Research Co., Ltd. (TSR) published “Next Generation Cockpit Display Systems for Automotive 2012-2013” and revealed the size of supervision cluster (Graphic meter) market in 2012. Supervision cluster that utilizes active LCD is dramatically increasing compare to the conventional meter cluster.

Market size of supervision cluster based on units increased 127.8% in 2012 to 12,040k units compare to previous year and became 3,838M USD by revenue. Currently types of car that mount supervision cluster are mainly F to E segment however it is expected to spread to D to C segment in near future. As a result, it will grow and cover about 33.9% of the total cluster display market.

= Market Trend of Supervision Cluster (Graphic Meter) by Unit =

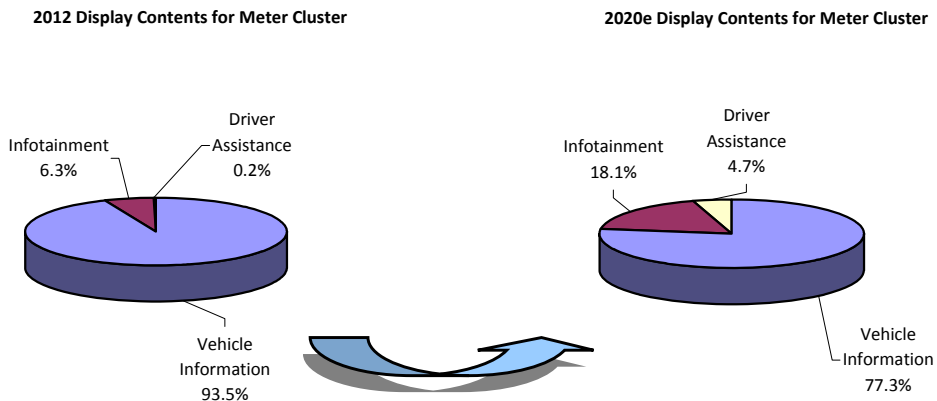


= Background of Expanding of Supervision Cluster Market and Changes in Contents Displayed =

There are many reasons for expanding of supervision cluster market. The reasons are related to increasing of information that a car receives because of installing Advanced Safety and Advanced Driver Assistance Systems (ADAS) and change in communication status. While projecting the received information on cluster display, contents that can be displayed is limited by the conventional meter cluster. Hence mounting active LCD is now considered as one of the answer to this problem. Installation of supervision cluster makes the number of displays increase in car, hence makers, mainly Car OEMs, are researching for the best orientation of each displays such as meter cluster , head up display (HUD), and center information display (CID) to reduce destruction of driving safety.

On the other hand, contents displayed on conventional and segmented LCD cluster were mainly about information in relation to vehicle information that were able to display in text style such as odd meter or gear shift. For the cluster display with dot matrix LCD, information of contents that can be displayed as icon were added, hence increasing in information of vehicle information such as mileage and door ajar alert and also part of safety system such as lane keeping assist (LKA) system and tire pressure monitoring system (TPMS) have become possible. Now, supervision cluster adopting active LCD lets 3D display, hence contents can be shown more intuitive to driver. Displaying image taken by automotive camera that is now increasing to mount on car as content shown on the display can also be added.

= Changes in Contents Displayed on Automotive Cluster Display =



* Please contact us for more details

[Contact information for News Releases and Reports]

Techno Systems Research Co., Ltd. (TSR)

1 group: Junichi Kimura (email: kimura@t-s-r.co.jp)

Tel: +81-3-3851-5651