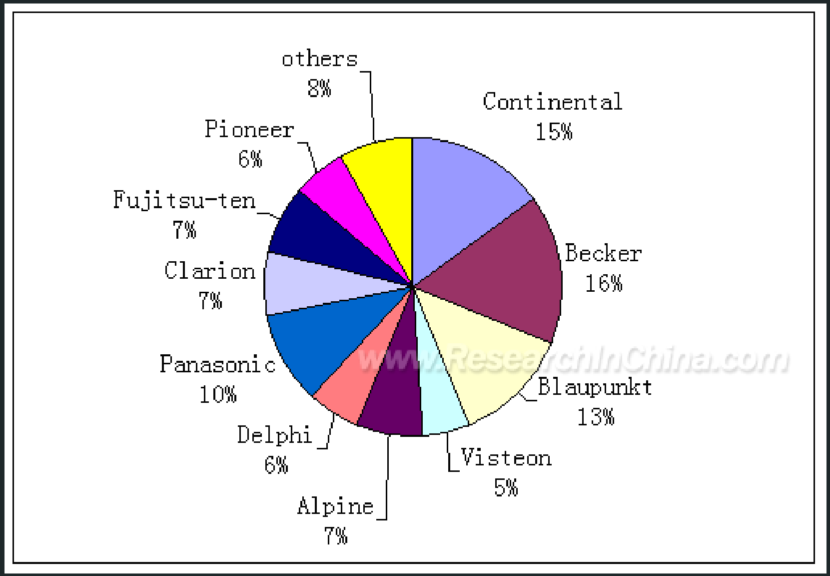
Global and China Automotive Audio & Infotainment Industry Report, 2008-2009

The recession of global automotive industry contrasts with the prosperity of China automotive industry. In Jan.-Apr.2009, China's auto output was 3.725 million sets, by an increase of 6.4%; sales volume 3,832,000, up 9.4%; sale/output ratio was up 2.55 points to 102.6%. As for models, the output and sale of passenger cars were 2,692,900 and 2,826,700 respectively, up 9.75% and 15.09% year-on-year, and the sale/output ratio increased 4.87 points to 104.97%. The output and sale of commercial vehicles were 1,031,900 and 1,005,200, down 1.46% and 3.86%, and the sale/output ratio dropped 2.43 points to 97.41%.

National economic stimulation policies continued to exert effects in April. Like March, the output and sale of automobiles in April set new records again, and the cumulative growth margin further expanded. The auto models that accounted for 52% of total sale and benefited from the favorable tax policy maintained stable growth rate in production and sale. The medium and high-end sedans began to revive. The output and sale of commercial vehicles did not fall sharply as before. The overall auto industry recovers. In fact, the automotive market in Mainland China has just begun to emerge, so the continuous high growth in this industry will be sustainable.

Automotive audio industry has already been a very mature industry. German, South Korean and Japanese automakers have their own specific parts and components providers with the cooperative relations of 30 years or 50 years, so it is very difficult for other suppliers to enter the industry. American automobile manufacturers emphasize cost, leaving potential opportunities for Chinese enterprises. The three major German automotive audio manufacturers --- Becker, Blaupunkt and Continental (Siemens VDO) almost monopolize the German market. Toshiba, Fujitsu Ten, Alpine, Pioneer, Clarion, JVC Kenwood monopolize the Japanese market. Hyundai Mobis and Hyundai Autonet are about to merge, and both of them monopolize the South Korean market. American market is monopolized by the giants -- Visteon and Delphi.

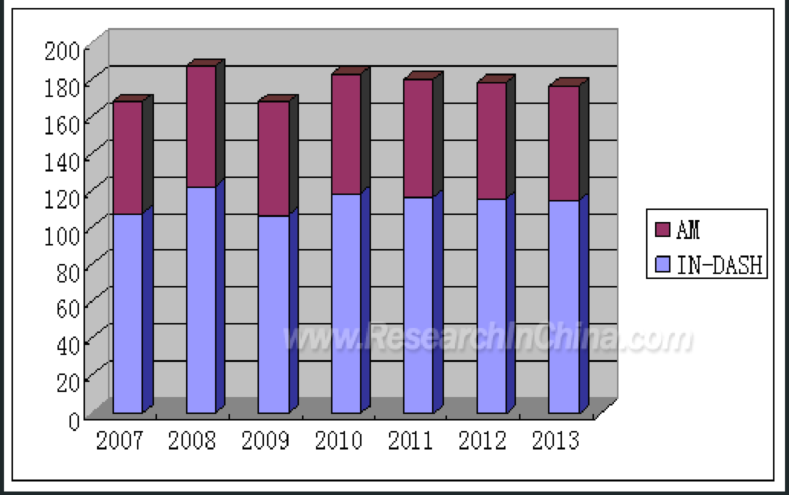
Market Shares of Global Automotive Audio System Manufacturers, 2008



Source: ResearchInChina

Automotive Infotainment System is the combination of automotive information system and entertainment system. Automotive information system mainly refers to navigation system, Telematics system and communication system. In 2008, the market valued approximately US$18.7 billion and after-market US$ 6.5 billion.

Global Automotive Infotainment Market Scale, 2007-2013 (US$: 100 million)



Source: ResearchInChina

Becker, Blaupunkt and Continental (Siemens VDO) almost monopolize the German market. In Japan, Toyota cooperates with AisinAW and Denso; Honda gets supply from Denso, Pioneer and Alpine; Nissan depends on Clarion, Alpine and Panasonic. American automakers have more suppliers than any others, including Becker, Blaupunkt, Continental (Siemens VDO), Denso, Alpine, Panasonic, Aisin Seiki, Clarion. Ford also has a lot of suppliers. Hyundai gets supply from Hyundai Autonet. PSA and Fiat mainly cooperate with Blaupunkt and Magneti-Marelli.

By types, Chinese auto audio and infotainment manufacturers can be divided into joint ventures, wholly foreign-owned enterprises and local enterprises. By product, manufacturers can be divided into head-unit enterprises, navigation enterprises and electro-acoustic enterprises. By value, sole proprietorship enterprises account for about 50%, joint ventures 40%, local enterprises 10%. Of total output value, head-unit enterprises occupy 65%; navigation enterprises 10%; and electro-acoustic enterprises 25%. Local enterprises focus on electro-acoustic field.

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