

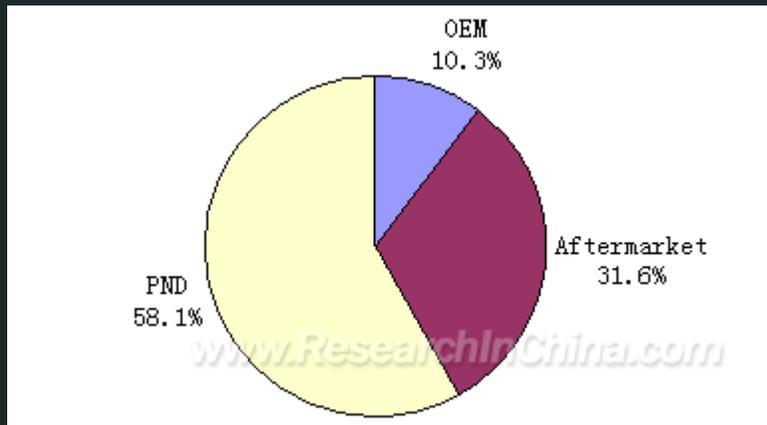
China Navigation Map Market Report, 2008-2009



Compared to Japan, Europe and U.S.A, Chinese car navigation market was still in its early stage. In 2008, the market penetration rate of car navigation in china was only 4.56%, far lower than the 60% of Japan, and 20%-30% of both Europe and U.S.A.

In 2008, The car ownership reached at 149 million in China, among which 40 million are private cars, and about 6.8 million cars have installed navigation devices. Also in 2008, Chinese car navigation market sharply increased, a total of 3.1 million navigation devices were sold during the year, more than doubled of 2007.

Share Distribution of Chinese Navigation Market by Segmentation in 2008



Source: ResearchInChina

The electronics map market scale is limited, accounting for 10-15% in the navigation industry chain. In addition, the electronic map database requires a long construction period, a large investment and high maintenance & updating cost.

The global key electronics map markets of Europe, U.S.A and Japan, are monopolized by TA, Navteq and Zenrin respectively. Especially the Navteq and TA have become the transnational navigation electronics map providers.

Considering the nation security, there is an admittance system regarding the electronics map in china. Up to Mar, 2009, a total of 11 electronics map providers were approved by the State Bureau of Surveying and Mapping, the key providers including NavInfo, AutoNavi, Ritu, Careland, Lingtu, Emappo and City On Map. NavInfo and AutoNavi focus on the original market, Ritu, Careland and City On Map focus on the aftermarket and portable navigation device market.

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