

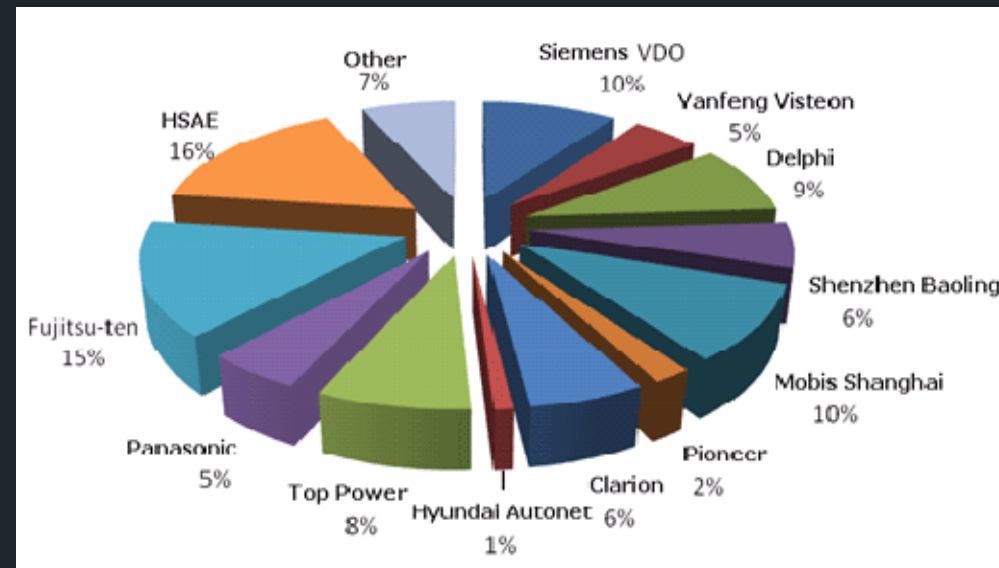
Global and China Automotive Audio and Infotainment Industry Report, 2009-2010



The factory OEM market is dominating the global auto audio industry while aftermarket mainly refers to changing audio cassette into CD player. Consumers will seldom modify the audio system if it is already a CD player. In 2009, the global auto audio industry still centered on the factory OEM market while the aftermarket only occupied 14.4% of the entire market scale. The global auto audio market is maturely developed, so there is small growth space for this market and the price keeps falling. It is estimated that the market size of auto audio during 2010-2012 will not experience a substantial increase, nor will the market size of auto audio aftermarket.

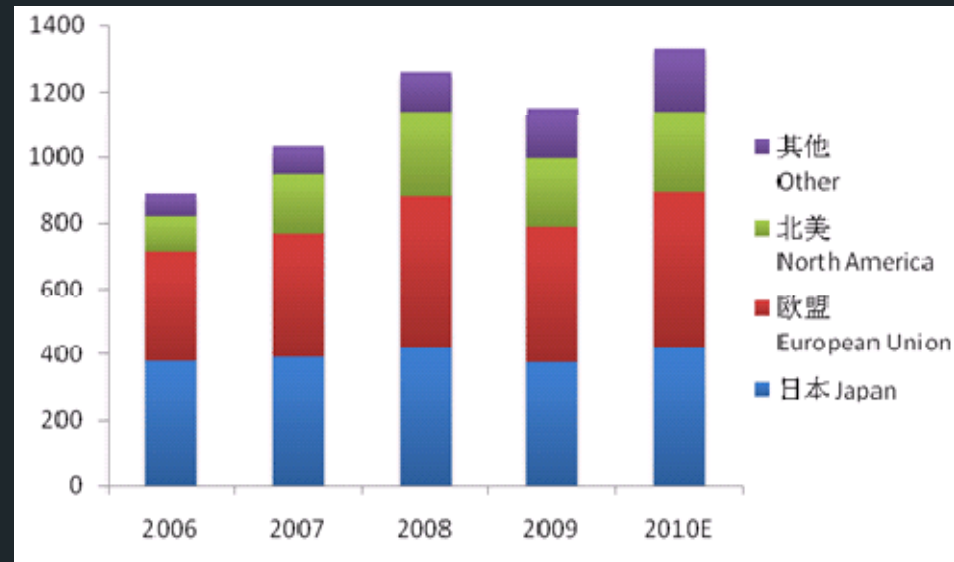
The auto audio in China is also led by the factory OEM market with the major manufacturers of auto audio covering Fujitsu-ten, Siemens VDO, Mobis Shanghai, Delphi, etc., of which, Fujitsu-ten enjoyed the largest shipment in 2009 with the market share reaching 15%.

Major Manufacturers and Market Share of China Factory OEM Auto Audio Market (by Shipment), 2009



Automotive Infotainment is a kind of equipment combining both automotive information system and entertainment system. In 2009, the global shipment of auto Infotainment was decreased, mainly owing to the declined demand of premium automobiles worldwide. The global shipment of auto Infotainment is mainly concentrated in Japan, European Union and North America, wherein, the shipment of auto Infotainment in Japan in 2009 accounted for 32.6% of the global total shipment.

Shipment of Automotive Infotainment by Region, Worldwide, 2006-2010



In the factory OEM market of auto Infotainment, the manufacturers that possess more than 10% market shares include Continental, Becker, Denso and AisinAW, while in the aftermarket, the ones with over 10% market shares cover Pioneer, Panasonic, Becker, Blaupunkt, and Alpine.

The manufacturers of automotive Infotainment in China are primarily composed of foreign-funded enterprises and joint ventures, of which, the foreign-funded enterprises approximately occupy 50%, the joint ventures about 40%, and Chinese local enterprises only 10%.

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