



# **Global and China Automotive Audio and Infotainment System Industry, 2010-2011**

**Oct. 2011**

## ***This report***

- ◆ **Analyzes the global and China automobile industry**
- ◆ **Focuses on the Telematics and audio & infotainment system market and industry**
- ◆ **Highlights the operation of global automotive audio and infotainment manufacturers.**

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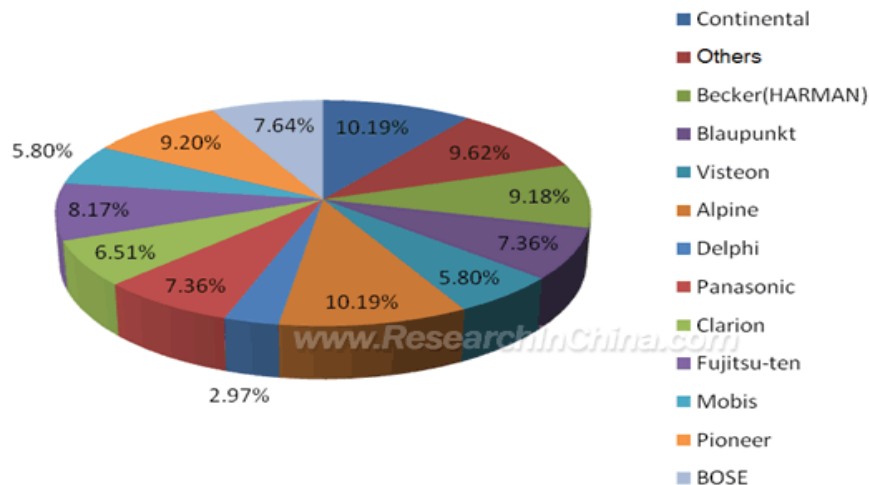
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## Abstract

Although people do not pay much attention to medium and low-end automotive audio, it is indeed the mainstream in the market.

Typically, medium and low-end automotive audio system has a head unit which can play CD and receive AM / FM radio. In the head unit, there is a 2 or 4-channel audio amplifier. The core of the head unit is a CD loader. In the world, automotive CD loaders are basically monopolized by Pioneer and Panasonic. Bose, an unlisted company in the United States, is the world's best manufacturer of automotive loudspeaker units.

**Market Shares of Major OE Automotive Audio System Manufacturers in the World, 2011**



Visteon is China's largest manufacturer of passenger car audio system by shipment. Continental is less and less interested in automotive audio system, so its market share has declined, but it still takes the second position in Chinese market.

Infotainment integrating navigation, DVD player and Telematics is the focus of the market now.

Continental's main client is Volkswagen. However, Volkswagen is increasing its purchase from Harman. Harman is the world's largest Infotainment manufacturer, and its clients include Audi, BMW and Mercedes-Benz. The strong consumption of luxury cars of Audi, BMW and Mercedes-Benz by rich people in China has benefitted Harman indirectly. Besides, Harman is the only non-Japanese manufacturer that enters Toyota's infotainment supply chain. Toyota's luxury car "Lexus" adopts the infotainment of both Denso and Harman.

Japan's Alpine is also a beneficiary, since its largest client is BMW instead of Japanese manufacturers. In 2011, BMW will spend over USD330 million on Alpine's products. Alpine's second largest client is Mercedes-Benz. In 2011, Mercedes-Benz will spend more than USD300 million on Alpine's products.

Denso is an affiliate of Toyota, and it is also the world's largest auto parts manufacturer. Its clients include Toyota, General Motors and Volkswagen.

Clarion is subject to Hitachi. Its largest client is Ford. In 2011, Ford will spend USD360 million on Clarion's products.

Telematics is a hot topic in China, but in fact it is meaningless for most of the manufacturers. Telematics is subject to automobile manufacturers, so independent telematics service providers have a rough time. For example, during five years, Huges, a company listed in the United States, only had 124,000 users by June 30, 2011, while GM's OnStar had more than 5 million.

Huges suffers consecutive loss. In 2010, it achieved the revenue of USD40 million, but suffered the loss of USD68 million. In 2011, the loss is bigger.

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