



# China Car Navigation Industry Report, 2011

Jan. 2012

## STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## INFORMATION SOURCES

The primary information sources include NBS(National Bureau of Statistics of China), Wind, and China Association of Auto Manufacturers etc.

## Abstract

Car navigation equipment mainly include two categories: In Dash navigation and Portable Navigation Device (PND).

In OEM market, In-Dash navigation devices play main roles. In December 2011, ResearchInChina investigated 3,698 models of passenger cars on sale in the Chinese market and found that 1,041 models (accounting for 28.2%, up 6.7 percentage points from 2010) were equipped with In-Dash navigation devices (as standard configuration).

In 2011, among all cars on sale in China, 42.7% of European cars were equipped with In-Dash navigation devices (as standard configuration), up 6.4 percentage points from 2010; the proportions of South Korean cars and Chinese cars with In Dash navigation devices (as standard configuration) saw the highest growth rates, and increased by 10.5 percentage points and 8.7 percentage points respectively.

## Proportion of Models on Sale Equipped with In-Dash Navigation Devices

	Proportion of Models on Sale with GPS, 2010	Proportion of Models on Sale with GPS, 2011	2011/2010
Japan	21.4%	26.1%	up 4.7 percentage points
South Korea	22.0%	32.5%	up 10.5 percentage points
Europe	36.3%	42.7%	up 6.4 percentage points
U.S.A	23.4%	21.5%	down 1.9 percentage points
China	8.9%	17.6%	up 8.7 percentage points
Total	21.5%	28.2%	up 6.7 percentage points

Source: ResearchInChina

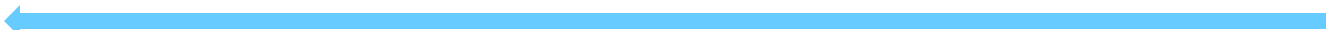
Compared with 2010, the proportion of automobiles (at the unit price of less than RMB500,000) equipped with In-Dash navigation devices (as standard configuration) in China in 2011 was higher, particularly 20.4% of the automobiles tagged with the unit price of RMB100,000-200,000 were installed with In Dash navigation devices instead of 11.9% in 2010. This shows that In-Dash navigation has become one of the important indicators in the configuration of middle and low-end automobiles.

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**This report analyzes:**

- ◆ Sales volume of global and Chinese automotive In-Dash navigation devices;
- ◆ Global and Chinese PND sales volume;
- ◆ Development of navigation electronic maps and major manufacturers in China;
- ◆ Proportion of automobiles equipped with In-Dash navigation devices (as standard configuration) in China by type and their prices
- ◆ Major sales channels of automotive navigation devices in China;
- ◆ Operation and navigation business of foreign-funded, Taiwan-funded and mainland Chinese automotive navigation companies;
- ◆ Major global and Chinese GPS chip manufacturers and their development.

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