



Global and China Automotive Audio and Navigation Industry Report, 2011-2012

Aug. 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 China Association of Automobile Manufacturers , National Bureau of Statistics of China and WIND Database etc.

Abstract

Global and China Automotive Audio and Navigation Industry Report, 2011-2012 covers the followings:

- Brief Introduction of Automotive Audio
- Brief Introduction of Telematics
- Global Automotive Market and Industry
- China Automotive Market and Industry
- Global and China Automotive Audio Market and Industry Analysis
- Global and China Automotive Navigation Market and Industry Analysis
- Research on 23 Major Automotive Audio and Navigation Manufacturers

Generally, low and medium-end passenger cars are only equipped with simple audio system, including one head unit with digital receiver and CD play functions, one dual-channel power amplifier, ordinary crossover and two to four loudspeaker units; most commercial vehicles have no CD player; navigation function is added to high-class cars, which stores electric map in DVD in early stage, but in HDD and flash memory card in recent years.

Audio performance of high-class cars has been improved a lot, with four to eight channels for power amplifier, accompanied by increased power for each channel, and loudspeakers can outnumber ten at most. For luxury cars, wireless communication functions involving 3G, telematics, Bluetooth, WiFi, etc. as well as the rear seat entertainment system have been added, usually, this system is referred to as Infotainment.

Revenue of Global Major Automotive Audio and Navigation Manufacturers (Unit: US\$M)

	2010	2011	2012E
HARMAN	2738	3406	3802
Continental	1829	1863	1913
PIONEER	2895	3303	3972
ALPINE	2294	2567	2785
CLARION	2032	2363	2405
PANASONIC	3238	3331	4080
FUJITSU-TEN	2482	2358	2302
JVC-KENWOOD	1232	1358	1426
Hyundai Mobis	1189	1306	1488
Delphi	1206	1202	1226
Visteon	462	508	522
Denso	1493	1595	1860
Aisin AW	862	974	1149
Mitsubishi Electric	1822	2008	2309

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In 2011 and first half of 2012, Japanese manufacturers performed outstandingly in the fields of automotive audio and navigation, especially in the latter. Although attacked by the 3.11 Earthquake, Thailand flood and the appreciation of Japanese yen in 2011, the Japanese car navigation shipment merely dropped 7.4%, and the shipment of navigation equipment storing electronic map in flash memory even went up by 18.1%. In the first half of 2012, Japan's local car navigation shipment amounted to 3.022 million units, a rise of 146.3% over the same period of last year. In the traditional automotive audio field, the Japanese manufacturers have further expanded their market occupancy, e.g., Pioneer's car CD player shipment saw an increase of 26.9% in 2011, up to seven million units. In the fields of automotive audio and navigation, Japanese manufacturers, except FUJITSU TEN, all witnessed revenue growth in 2011, moreover, the growth rate in the first half of 2012 all exceeded 10%.

The Japanese manufactures not only monopolize the audio and navigation markets of Japanese car manufacturers, but also take up an increasing proportion in the European and American markets.

Mercedes-Benz, for example, C-CLASS/E-CLASS/GLK-CLASS uses audio and navigation of Mitsubishi Electric, GL-CLASS/M-CLASS adopts audio and navigation of Alpine, which is also the second largest supplier of car audio and navigation for BMW; Audi TT employs audio and navigation of Aisin AW; American manufacturers such as GM use Denso's navigation, involving CHEVROLET VOLT/Avalanche/Suburban/Corvette/Silverado/Tahoe Hybrid; navigation of Buick LACROSSE and CADILLAC SRX is also provided by Denso, so does Land Rover; Ford applies a lot of Clarion navigation.

As for American manufacturers, only Harman maintains steady growth. It occupies the luxury market, and is well-known for its Infotainment, which is applied in Audi A4/A5/Q5/Q7/S4/A6, Volkswagen Touareg/Routan and Porsche.

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- 1.2 Global Automotive Industry

2. China Automotive Market and Industry

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