China Navigation Equipment Industry Report, 2012-2014

Nov. 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 China Technical Application Association for Global Positioning System, and China Association for Geographic Information Service etc.

Abstract

After forty years of development, the global satellite navigation system has developed into a “one plus three” pattern. And the “one” refers to GPS made in the USA, and the three refer to Chinese, Russian and European equivalents which are in the position to compete with the made-in-America GPS. The America-made GPS is currently the only navigation satellite system being put into full operation, with the application services holding over 90% of the world’s total. GPS system is in the world’s leading position in terms of maturity and precision. In addition, the made-in-Russia GLONASS is under restorative construction and can offer some application services. For China, the Beidou 2nd generation navigation system it to finish the network construction covering the Asian-Pacific region at the end of 2012 and, started trial operation in late 2011. Moreover, the EU’s Galileo System is also under construction and, it is expected to be officially put into service by 2014.

With the global navigation satellite system entering into the application phase gradually, the demand for navigation equipment is expected to grow sustantially. Navigation equipment, as the most essential part in the navigation satellite market, occupies nearly half of the market demand, mainly comprising positioning devices, vehicle-mounted devices, airborne navigation equipments, etc. In 2010, the shipment of global navigation satellite system equipments hit 437 million pcs, while the figure in 2020 is expected to excceed 1 billion pcs.

In 2011, the satellite navigation output value in China approximated RMB75 billion, but more than 90% was brought from GPS. At the end of 2010, the Beidou application (Beidou terminal plus operation) output value in China reached roughly RMB500 million, with the market share less than 1% in the domestic satellite navigation market. China is accelerating its pace to develop the satellite application industry centering the application of satellite communication radio, satellite navigation and satellite remote sensing. The market scale of Chinese satellite navigation industry is predicted to get to RMB400 billion by 2020 and, the market size of high-precision GNSS market by then is expected to realize RMB80 billion.

China is actively endeavoring to optimize the Beidou navigation system. Since April 2007, China has launched the Beidou 2nd generation navigation system which is superior to the Beidou 1st generation system in terms of the subscriber capacity, positioning precision, service zone, dynamic property and interference rejection, etc, on the heels of the launch of four satellites between October, 2000 and February, 2007. On September 19, 2012, China launched the 14th and 15th Beidou navigation satellites with one carrier rocket, marking that only one left to be launched to meet the network construction of Beidou 2nd generation navigation system. And it is estimated that the 16th satellite, also the last one, will be launched during November-December. Furthermore, China issued the test ICD file in December 2011 and, is set to launch official ICD file in late 2012.

International chip magnates also embark on the production of Beidou navigation chips in the wake of the launch of Beidou ICD file, further fueling the market competition. By contrast, Chinese chip producers feature small scale and laggard technology, so they are not in the position to compete with international counterparts. However, Chinese industrial players secure superiority in military industry and the related application market.

Revenue from Navigation and Related Businesses of Chinese Navigation Equipment Manufacturers(Unit: RMB mln)

	2011	2012H1
Bdstar	484.26	244.19
Unistrong	441.32	168.5
Hi-target	296.27	148.06
Qiming Information	202.29	109.78
Goldtel Electronical	197.53	119.73
Haige Communications	40.76	
Hwa Create	25.26	20.58

Source: www.researchinchina.com

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The report falls into five chapters and 125 charts, focusing on the development of global and China navigation equipment industry in 2011-2012, evolution of main navigation satellite systems as well as the operation of 12 key Chinese navigation equipment companies.

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