



**China Car Navigation Industry Report,  
2012-2013**

**Mar. 2013**

## 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

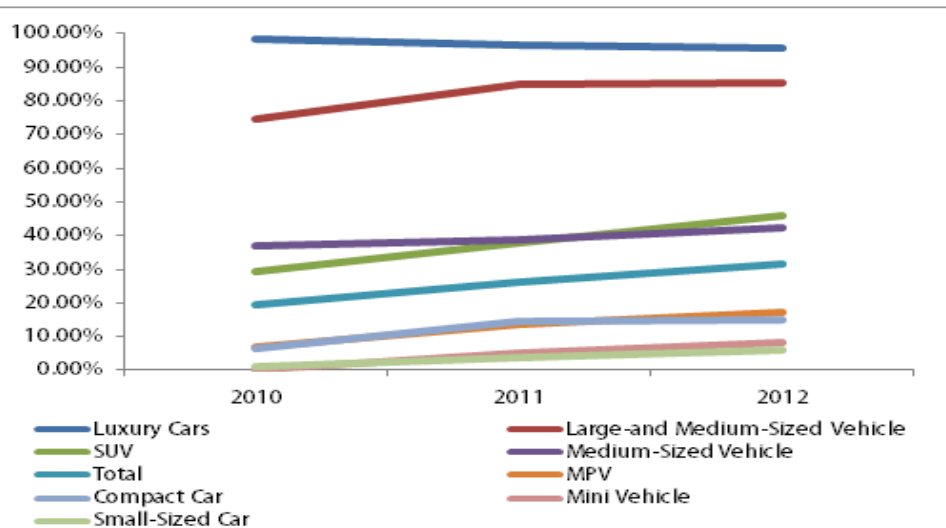
The primary information sources include Company Reports, China Association of Automobile Manufactures and National Bureau of Statistics of China etc.

## Abstract

In 2012, 3,852 models of passenger cars under 104 brands were on sale in the Chinese market, including 1,210 models equipped with navigation systems before launch, with the installation ratio of 31.41%, higher than the proportion in the previous two years (only 19.58% and 26.05% in 2010 and 2011 respectively).

Compared with the previous two years, the installation proportion of

### Installation Proportion of In-dash Navigation in Various Types of Automobiles in China, 2010-2012



Source: ResearchInChina China Car Navigation Industry Report, 2012-2013

car navigation systems in various models has been rising, especially mini cars saw a breakthrough with the installation ratio of 8.23%, while the ratio was 0 in 2010. In addition, the installation ratio of small cars, compact cars, mid-sized cars, MPV and SUV has ascended by varying degrees.

In 2012, Chinese In-dash navigation market size reached 4.25 million units, with a year-on-year increase of about 8%. The PND market maintains the downward trend. In the future, with the rising installation ratio of In-dash navigation and the growing prevalence of smart phones, the PND market will further shrink.

In 2013, China started to promote BDS in large scale and BDS has been used in civil fields. Ministry of Transport of the People's Republic of China requires 80% or more of large-sized buses, tourism coaches and dangerous goods transport vehicles in nine demonstration provinces and municipalities including Jiangsu, Anhui, Hebei, Shaanxi, Shandong, Hunan, Ningxia, Guizhou and Tianjin should be installed with BDS terminals before the end of March 2013. The demand for BDS terminals is expected to be 80,000 sets. With the expanding application scope of BDS, more and more car navigation manufacturers will commit to the research on BDS automotive terminals.

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As one of the leading satellite navigation service providers, BDStar focuses on such businesses as satellite navigation and location information. With the civil application of BDS, BDStar has accelerated the expansion in the field of automotive electronics in recent years. Currently, BDStar has established production bases in Jiangsu, Shenzhen and Chongqing; at the same time, it has been perfecting the dealer network. It has conducted mass production of In-dash automotive and portable navigation terminals, with the annual capacity of over 100,000 sets. Along with the rising demand for BDS automotive terminals, BDStar will be the first beneficiary.

The traditional automotive navigation products of Huizhou Foryou Group, as one of the leading automotive navigation producers in China, are mainly based on GPS. With the application and development of BDS, the company has increased investments in R & D of Beidou products; besides, it has cooperated with OLinkStar to develop low-cost automotive GPS / Beidou dual-mode navigation systems. In February 2012, the company released an automotive GPS/Beidou dual-mode navigation system product.

## **The report highlights the followings:**

- Chinese automotive navigation system industry chain and industry environments;
- Installation, prices, models and series of Chinese automotive navigation systems;
- The global automotive navigation system market size and structure;
- Chinese automotive navigation system market size (including In-dash navigation systems and PND) and future trends;
- Development of the world's leading automotive navigation system manufacturers;
- Major Chinese automotive navigation system manufacturers and service providers.

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