Global and China Automotive Audio and Infotainment Industry Report, 2013

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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, and National Bureau of Statistics of China etc.

Abstract

Global and China Automotive Audio and Infotainment Industry Report, 2013 mainly covers the followings:

1. Recent Developments of Global Automotive Market
2. Recent Developments of China Automotive Market
3. Introduction to In-vehicle Infotainment (IVI)
4. Automotive Audio Market and Industry Research
5. Automotive Infotainment Market Research
6. 23 Major Automotive Audio and Infotainment Vendors

In 2013, global infotainment market size approximated US$30.1 billion, an increase of 4.2% from a year earlier; and the decelerated growth was due to the sluggish European automotive market and lower infotainment prices. The market is expected to restore growth from the next year, with the size up 12.2% to US$33.8 billion in 2014, US$40.1 billion in 2015 and US$45.6 billion in 2016.

Infotainment market growth is largely because its increased and upgraded functions have greatly raised price. High-end infotainment map will be upgraded to 3D map, with display up from 6-8 inches to 10-12 inches, and rear-seat entertainment system will be more popular, also accompanied by the adding of 3G or 4G network connection as well as the mushrooming of corresponding smart phone APPs.

Ranking of World's Major Automotive Infotainment Vendors by Revenue, 2012-2013

	Infotainment Revenue in 2012	Infotainment Revenue in 2013	Automotive Audio Revenue in 2012	Automotive Audio Revenue in 2013
Harman	2,299	2,386	1,068	1,130
Continental	2,608	2,920	960	970
Pioneer	2,270	2,308	1,206	1,120
Alpine	1,918	2,008	712	718
Clarion	1,495	1,480	520	530
Delphi	1,388	1,406		
Visteon	660	760	460	510
Panasonic	3,580	4,120	708	790
Fujitsu TEN	2,217	2,106	693	630
Aisin AW	2,660	2,720		
Denso	2,720	2,880		
JVCKENWOOD	660	638	390	350
Garmin	1,380	1,308		
Others	3,380	3,310		

Unit: US$M source:Researchinchina.com

Infotainment will also see qualitative leap i.e. added by advanced driver assistance systems (ADAS); thus HUD system is bound to be added in the future, which will significantly improve the cost, but also means instrument cluster companies need to collaborate with infotainment vendors. Japan's Aisin AW and DENSO, U.S. Visteon and Delphi, Germany's Continental and South Korea's Mobis all have instrument cluster business, showing obvious future edges.

The massive prevalence of smart phones enables automotive infotainment to undergo a reform, 3G or 4G network connection will greatly improve automotive infotainment prices. At present, there are two camps for automotive networking, one of them is led by vehicle manufacturers, represented by GENIVI, whose founding members include Volvo, BMW, FAW, GM, HONDA, HYUNDAI, JAGUAR, JOHNDEER, NISSAN, PSA, RENAULT and SAIC. GENIVI uses general purpose platform, may be Linux with open-type application programming interface, high cost, high safety, long development cycle, infotainment embedded with 3G or 4G network connectivity, and the service charge will be high.

Another camp is led by smart phone vendors like MirrorLink and MHL. MirrorLink, jointly launched by three well-known mobile phone vendors – Nokia, Samsung and LG, six automakers – Daimler, General Motors, Honda, Hyundai, Toyota and Volkswagen, as well as two system suppliers - Alpine Electronics and Panasonic, embeds APP in phone and infotainment, connected by USB or WiFi, with very short development cycle, low cost, and a large number of products have been rolled out into the market. There is simpler MHL League, co-founded by Nokia, Samsung, Sony, Toshiba and Silicon Image, with higher transmission rate and lower prices.

In the industry, OEM market is by degrees expanding, while after market is just the opposite, because today's high-end automotive configuration will become tomorrow's low- and mid-end automotive configuration. Despite a shrinking trend, the aftermarket still attracts quite some small vendors due to the low threshold, especially the Chinese market gathers hundreds, many of them see annual revenue of less than RMB20 million. There is serious product homogeneity in the Chinese market, accompanied by fierce price competition. Large vendors, always, can't bear the meager profit to declare bankruptcy, e.g. Huizhou Freeway Electronics Co., Ltd. which was closed down in August 2013.

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