Global and China Automotive Audio and Infotainment Industry Report, 2013-2014

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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

The report mainly covers the following:

1. Global automotive industry and market
2. China automotive industry and market
3. Development trend of global automotive infotainment
4. Global automotive infotainment industry and market
5. 23 automotive infotainment vendors

Mid- to lower range automobile is usually equipped with a simple set of audio system, which is mainly composed of head-unit, amplifiers and loudspeakers, while for premium car, the addition of communications, navigation and display systems on this basis turns it into infotainment system. Massive prevalence of smartphone promotes the upgrading of infotainment system once more, developing towards integration of more functional systems, like infotainment in Model S of Tesla, which has become the automobile information and network center.

The infotainment market has evolved from a pattern absolutely dominated by infotainment suppliers to the one with three pillars, namely, automobile factory, infotainment supplier and mobile phone vendor. For the moment, it seems that mobile phone vendors have competitive edge. Apple and Google were early conscious of the trend and both introduced corresponding systems. For luxury car makers, customer satisfaction precedes costs and in order not to stand wrong side in the war between Apple and Google, they support the two systems. High-end vendors tend to support Apple's system, whereas medium and low-end automakers are more inclined to support Google's system.

The design of infotainment system has become unprecedentedly sophisticated, which caused differentiation of infotainment industry. The infotainment firms, especially European and American ones, which have close cooperation with carmakers, focus on design and outsource or purchase hardware as much as possible, while the companies, which originally excelled in hardware manufacturing, notably Japanese ones, started making more efforts in hardware field, providing OEM service or key parts. For now, regardless of any infotainment, its head-unit must be equipped with a suite of CD/DVD Mechanism, with over 75% market share held by Panasonic, J&K and Pioneer. Due to high barriers to entry, profit of OEM is no less than that of brand vendors.

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It is quite peculiar when it comes to loudspeaker system. Although Japanese companies have superb technologies, but the loudspeaker system has been hardly accepted by Europeans and Americans, largely caused by great cultural differences. Consequently, Bose and Harman together occupy nearly 80% of loudspeaker system market.

Local infotainment companies have little say in China automotive industry. Foreign side controls joint ventures' purchase of key parts, which are almost bought from joint ventures or solely foreign-owned enterprises, and indigenous brands purchase parts produced mainly by joint ventures. In the arena of infotainment, except Desay SV Automotive, which provides OEM, other companies can only operate in the aftermarket which has low threshold and is full of small companies. Combined with the yearly growing proportion of navigation-equipped new automobile, the aftermarket will gradually shrink.

Revenue of Major Global Automotive Infotainment Companies, 2012-2013

	Infotainment Revenue, 2012 (USD mln)	Infotainment Revenue, 2013 (USD mln)
Denso	2,720	2,880
Contineta l	2,608	2,720
AisinAW	2,660	2,600
Harman	2,299	2,506
Pioneer	2,570	2,308
Fujitsu TEN	2,117	2,226
Panasonic	2,080	2,220
Alpine	1,918	2,118
Clarion	1,595	1,480
Delphi	1,388	1,406
Garmin	1,380	1,208
Visteon	660	760
JVCKENWOOD	660	638

Note: The data exclude revenue from OEM.

Source: Global and China Automotive Audio and Infotainment Industry Report, 2013-2014

Table of contents

Selected Charts

- Sales Volume of Major Global Automotive Brands, 2010-2013
- Light-duty Vehicle Output, 2011-2014
- Heavy-duty Vehicle Output, 2011-2014
- China's Automotive Output, 2001-2013
- China's Automotive Output and YoY Growth by Type, 2008-2013
- Sales Volume of Major Automakers in China, 2013
- Sales Volume of Homegrown Automakers, 2013
- Monthly Sales Volume of Automobile in China, Jan. 2005 –Apr. 2014
- Monthly Sales Volume of Passenger Car in China, Jan. 2006-Apr. 2014
- Monthly Sales Volume of Commercial Vehicle in China, Jan. 2006-Apr. 2014
- Market Share of Major Passenger Car Brands in China, 2012-2014
- Typical Diagram of Infotainment
- Typical Indicators of Infotainment
- Global Connection Service, TSP, Telecom and Hardware Market Size, 2009-2018E
- Global Auto Connection Service Equipment Shipments, 2009-2018E
- Global Connectivity Equipped Car Shipments by Region, 2013&2018E
- Automotive Audio System Industry Chain
- Introduction to Automotive Audio System Industry Chain
- Market Share of Major OE Automotive Audio System Vendors in the World, 2011
- Market Share of Major Automotive Audio System Vendors in European Union, 2008-2011
- Market Share of Major Automotive Audio System Vendors in North America, 2008-2011
- Market Share of Major Automotive Audio System Vendors in Asia-Pacific, 2008-2011
- Supply Ratio of Major Automotive Audio System Vendors for Toyota, 2013
- Supply Ratio of Major Automotive Audio System Vendors for Honda, 2013
- Supply Ratio of Major Automotive Audio System Vendors for Nissan, 2013
- Supply Ratio of Major Automotive Audio System Vendors for General Motors, 2013
- Supply Ratio of Major Automotive Audio System Vendors for Ford, 2013

Selected Charts

- Supply Ratio of Major Automotive Audio System Vendors for Volkswagen, 2013
- Supply Ratio of Major Automotive Audio System Vendors for BMW, 2013
- Supply Ratio of Major Automotive Audio System Vendors for Benz, 2013
- Supply Ratio of Major Automotive Audio System Vendors for Hyundai, 2013
- Supply Ratio of Major Automotive Audio System Vendors for PSA, 2013
- Market Share of Major OE Automotive Audio Vendors in China, 2013
- Global Automotive Infotainment Market Size, 2011-2018E
- Global Automotive Infotainment Shipments, 2011-2018E
- Global Automotive Infotainment Penetration, 2011-2018E
- Ranking of Major Global Automotive Infotainment Vendors by Revenue, 2012-2013
- China's Automotive Infotainment Shipments, 2011-2016E
- Market Share of Major Automotive OEM Infotainment Vendors in China, 2013
- Top 10 Automotive AM Infotainment Vendors by Sales Volume, 2012
- Top 10 Automotive AM Infotainment Vendors by Sales Value, 2012
- Supply Ratio of Major Automotive Navigation Vendors for Toyota, 2013
- Supply Ratio of Major Automotive Navigation Vendors for Honda, 2013
- Supply Ratio of Major Automotive Navigation Vendors for Nissan, 2013
- Supply Ratio of Major Automotive Navigation Vendors for General Motors, 2013
- Supply Ratio of Major Automotive Navigation Vendors for Ford, 2013
- Supply Ratio of Major Automotive Navigation Vendors for Volkswagen, 2013
- Supply Ratio of Major Automotive Navigation Vendors for BMW, 2013
- Supply Ratio of Major Automotive Navigation Vendors for Benz, 2013
- Supply Ratio of Major Automotive Navigation Vendors for Hyundai, 2013
- Infotainment Suppliers for Typical Auto Models
- Revenue and Operating Margin of Harman International, FY2004-FY2014
- Sales and EBITDA Margin of Harman International, Q1 FY2012-Q3 FY2014
- Revenue Breakdown of Harman International by Business, FY2010-FY2016E

Selected Charts

- Gross Margin of Harman International by Division, FY2010-FY2014
- Revenue Breakdown of Harman International by Region, FY2006-FY2013
- Customer Structure of Harman International, FY2008-FY2014
- Harman International Infotainment and Lifestyle Backlog, FY2009-FY2013
- Revenue of Harman International in China, FY2009-FY2014
- Major Customers for Harman International's Car Audio
- Harman International's Manufacturing Bases Worldwide
- Sales and EBIT of Continental, 1998-2013
- Sales Breakdown of Continental by Region, 2008-2013
- Sales Breakdown of Continental by Division, 2008-2013
- Global Distribution of Continental Automotive - Interior Division
- Revenue and Operating Margin of Continental Automotive - Interior Division, 2007-2014
- Revenue Breakdown of Continental Automotive - Interior Division by Region, 2009-2012
- Revenue and Operating Margin of Pioneer, FY2006-FY2014
- Revenue Breakdown of Pioneer by Division, FY2007-FY2015E
- Revenue and Operating Margin of Pioneer - Automotive Electronics Division, FY2007-FY2015E
- Revenue Breakdown of Pioneer by Region, FY2012-FY2015E
- Pioneer Auto Electronics Sales Plan in Emerging Markets
- Capacity Statistics of Pioneer Car Audio Manufacturing Bases Worldwide
- Organizational Structure of Pioneer Car Audio in China
- Customer Distribution of Shinwa Industries (China)
- Revenue and Operating Margin of Alpine, FY2006-FY2014
- Revenue Breakdown of Alpine by Business, FY2012-FY2014
- Revenue and Operating Margin of Alpine – Car Audio Division, FY2006-FY2014
- Revenue and Operating Margin of Alpine - Information & Communication, FY2005-FY2014

Selected Charts

- Revenue Breakdown of Alpine by Region, FY2005-FY2013
- Revenue Breakdown of Alpine by Region, FY2014
- Profile of Alpine Branches in China
- Revenue and Operating Margin of Clarion, FY2006-FY2014
- Revenue Breakdown of Clarion by Region, FY2009-FY2014
- Manufacturing Bases Distribution of Clarion
- Organizational Structure of Clarion in China
- Revenue and Gross Margin of Delphi, 2004-2014
- Revenue and Operating Margin of Delphi, 2007-2014
- Revenue and EBITDA Margin of Delphi, 2007-2013
- Revenue Breakdown of Delphi by Product, 2009-Q1 2014
- EBITDA of Delphi by Division, 2010-Q1 2014
- Customer Distribution of Delphi, 2010-2016E
- Revenue Breakdown of Delphi by Region, 2010-2013
- Organizational Structure of Delphi Before and After the Merger
- Revenue Breakdown of Delphi Before and After the Merger by Region
- Auto Electronics Business Revenue of Visteon by Product, 2013
- Auto Electronics Business Revenue of Visteon by Region, 2013
- Auto Electronics Business Revenue of Visteon by Customer, 2013
- Organization of YFV
- Structure of YFV
- Organizational Structure of YFV-Electronics
- Revenue Breakdown of YFV by Customer, 2012
- Revenue Breakdown of YFV by Product, 2012
- Distribution of YFV in China
- Revenue of YFV, 2002-2012
- Production Bases of YFV – Electronics

Selected Charts

- Key Events of YFV – Electronics
- Revenue Breakdown of YFV by Customer, 2010
- Revenue Breakdown of YFV by Customer, 2011
- Revenue Breakdown of YFV by Product, 2010
- Vehicle Infotainment Products of Hangsheng Electronics
- Major Customers of PAS
- Revenue Breakdown of PAS by Region, FY2012
- Revenue Breakdown of Panasonic Automotive Sector by Product, FY2012
- Organizational Structure of Panasonic Automotive Systems Dalian
- Revenue and Operating Margin of Fujitsu Ten, FY2005-FY2014
- Revenue Breakdown of Fujitsu Ten by Division, FY2005-FY2013
- Revenue and Operating Margin of Aisin Seiki, FY2007-FY2014
- Non-Toyota Customer Structure of Aisin Seiki, FY2013-FY2014
- Non-Toyota Customer Structure of Aisin Seiki, FY2009-FY2011
- Revenue and Operating Income of Aisin Seiki, FY2007-FY2015E
- Navigator Output of Aisin Seiki, FY2008-FY2014
- Revenue and Operating Margin of Denso, FY2006-FY2014
- Customer Structure of Denso, FY2008-FY2014
- Revenue Breakdown of Denso by Product, FY2012-FY2014
- Revenue and Operating Income of Denso by Region, FY2013 & FY2014
- Organizational Structure of Coagent Electronics
- Revenue and Operating Income of JVC Kenwood, FY2009- FY2014
- Revenue of JVC Kenwood by Division, FY2008-FY2013
- Revenue of JVC Kenwood - Auto Electronics, FY2008-FY2015E
- Models Using Bose Audio
- Sales and Operating Margin of Garmin, 2007-2014
- Sales Breakdown of Garmin by Business, 2009-H1 2014
- Operating Income of Garmin by Business, 2009-2013
- Sales Breakdown of Garmin by Region, 2009-2013

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