

# **Global and China OBD Telematics Industry Report, 2014-2015**

**Mar. 2015**

## 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

OBD (on-board diagnostic system) is an electronics self diagnostic system, typically used in automotive applications. It can monitor whether the automobile exhaust exceeds the standard or the system is normal at any time from the running state of the engine, and according to the fault code, maintenance personnel can quickly and accurately determine the nature and location of a fault. The information is stored in the ECU in the form of fault code, and ECU ensures the fault information access and processing through standard data interface.

OBD telematics is mainly composed of three parts: OBD terminal (hardware and plug-in OBD interface), software (mobile phone APP) and cloud platform.

Along with the development of intelligent automobile hardware and mobile internet, the car becomes the next fast-growing mobile terminal and telematics market also ushers in rapid development. At present, the enterprises are aggressively engaged in telematics market layout and seizing the entrance to telematics, then OBD-based telematic solutions become an important entrance.

## China's OBD Telematics Market Participants and Their Products, 2010-2014

Company Type	Representatives	Time of First Launch	Product
OBD Terminal Manufacturer	Sinocastel	2010	IDD-213G, IDD-212GL, IDD-212B, IDD-213T, IDD-213N/E, IDD-218G, HT-196R, HT-192
	Rainbow Wireless	Jun. 2012	Cheyi
	Wiselink	Jun. 2012	Wiselink
	Digital DNA	2,012	GID2.0, GID V360, GID Lite
	Huawei	Feb. 2013	DA3100
	Comit	Dec. 2013	gooddriver
	LAUNCH	Feb. 2014	golo3
	VGO Interaction	Mar. 2014	AutoBot, AutoBotmini
	Tainiu	Apr. 2014	Tainiu Car Box
	PATEO	Jun. 2014	iVokaMINI X
Internet Company	CARSMART	Aug. 2014	LeCheng Box
	AUTONET	Oct. 2014	JiaBao Box
	HiCar	Nov. 2014	HiCar
Auto Aftermarket Service Company	Tencent	41,760	LuBao Box
	ichexian.com.cn	41760	CheBao
Operator	ChinaEkingo Inc	2,014	Che A Po and EMIV
	China Mobile	Nov. 2014	OBD He Box
	China Telecom	Nov. 2014	CheXingYiTong

Source: ResearchInChina

Part of the fleet management and vehicle tracking solution providers (such as Geotab, Xirgo, Scope Technologies and ATrack), automotive electronic enterprises (Danlaw, TECHTOM, etc.) and insurance companies (Progressive, State Farm, Allstate, Insurethebox) launched their OBD telematics products during 2006-2012. In 2013-2014, the OBD intelligent hardware market attracted the attention of capital market; and automotive electronic enterprises, start-up companies, insurance companies, mobile operators, etc. were getting involved in it successively. Among them, the startup Automatic Labs recorded more than one million units in OBD terminal shipments each year.

Prior to 2012, some Chinese enterprises developed OBD terminal, but failed in marketization due to technology and other reasons. Some companies formed the “OBD terminal + APP + Cloud Platform” business model at the outset of 2012. From the end of 2013 to early 2014, influenced by the foreign OBD intelligent hardware investment boom, this OBD telematics mode gained market attention, and all enterprises started OBD telematics market layout.

Currently, enterprises involved in OBD telematics (including independent brand OBD terminal) fall into four types: traditional OBD terminal manufacturers (part of the vehicle manufacturers, telematics companies, start-ups, etc.), internet companies, operators, and auto aftermarket service companies.

In addition to a large number of enterprises' inburst, the global and Chinese OBD telematics market characterized the followings in 2014:

- (1) The service function of OBD telematics was further promoted besides application in UBI, fleet management, etc. In January 2015, Automatic worked with the smart thermostats company -- Nest to make its OBD products turn into the smart home controller. In the same month, Zubie also reached data exchange cooperation with PEQ, a provider of all software and services for SmartHome Ventures.
- (2) The cloud platform of OBD telematics will be further opened, with API available for software developers which can use the data collected by the platform as well as OBD terminal equipment access interface for other competitors to increase the use of big data through data sharing, e.g. Carvoyant opened platform interface to Velio (an OBD device manufacturer) in January 2015.

(3) The voice recognition technology will be applied to OBD telematics. So far, some OBD telematics companies have added the function of voice broadcast in APP, such as Comit's gooddriver, Baidu map version golo, etc., but the application of speech recognition is almost blank in OBD telematics.

(4) Currently, OBD is focused on the analysis of data; in the future, OBD terminal is expected to further integrate other function modules (air purification module, voice recognition module) and become multi-functional and intelligent.

Global and China OBD Telematics Industry Report, 2014-2015 mainly covers contents below:

- Overview of OBD (including definition, composition, development history, interface and related products);
- Global telematics market (embracing definition, development situation, industry chain, business model, profit model, market size, penetration, etc.);
- Global OBD telematics market (covering market status, business model, profit model, major applications, etc.);
- China OBD telematics market (including car sales, ownership, industry chain, development history, market status, etc.);
- 12 global and 11 Chinese OBD telematics companies (including profile, operating performance, revenue structure, OBD telematics business, latest news, etc.)

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  - 1.1.1 Definition
  - 1.1.2 Composition
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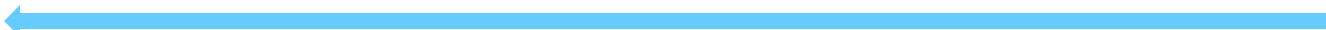
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