Global and China Automotive Audio and Infotainment Industry Report, 2014-2015

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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.

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Abstract

Global and China Car Audio and Infotainment Industry Report, 2014-2015 covers the following:
1. Global automobile market and industry;
2. China's automobile market and industry;
3. Automotive infotainment development trends and supply chain
4. Automotive infotainment market and industry
5. Twenty-three key automotive Infotainment vendors

The definition of Infotainment is so vague that virtually all vendors have their own definition in this respect. In a broad sense, Infotainment includes simple Audio System (also known as Audio Infotainment) in low-end models and traditional in-vehicle navigation system in mid-end models. In a narrow sense, however, Infotainment contains HMI, Connectivity (WiFi\3G\LTE\Bluetooth\Mobile Phone), Telematics (Navigation\Alerts), Entertainment (Radio\Audio\Video), and ADAS (Cameras Display\Black box), that is to say, Hi-end Infotainment.

Today's Hi-end Infotainment is the mainstream Infotainment in the future. The design of Infotainment software is becoming more and more complicated so much so that traditional Infotainment companies began to aggressively acquire software companies to stabilize their market position. In addition, Infotainment is also getting closer to ADAS. In January 2015, Harman acquired RedBend, an Israeli software company, for USD170 million and Symphony Teleca for USD870 million.

In 2015, Delphi spun off non-core Thermal and Reception businesses, purchased Hellermann Tyton and Ottomatika, and invested two start-ups: Tula and Quanergy. Quanergy mainly specializes in Lidar. In July 2015, Continental acquired Elektrobit. In future, more software enterprises will be acquired.

With the popularity of smartphones, the traditional single navigation system market has been severely squeezed and will be eliminated rapidly. In future, Infotainment is likely to integrate with Head Unit Display and contain the content displayed by Instrument Cluster and Climate Control as the core of Cockpit Electronics. Its control range will be extremely extensive and its display size will get quickly enlarged, to at least 12 inches.

In 2014, the market size of generalized Infotainment came to USD33.8 billion, and this figure is expected to hit USD36 billion in 2015. In contrast, the narrowly-defined Infotainment saw a market size of USD18.1 billion in 2014, and the scale is estimated to reach USD22.1 billion in 2015 and USD29.1 billion in 2017. The shipments of narrowly-defined Infotainment totaled 18.9 million units in 2014, and the estimated figures will be 24 million units in 2015, 31.8 million units in 2017, and 36.5 million units in 2020.

Japanese companies, though as overlords in Infotainment, are not adept at software and therefore are declining. This, coupled with the depreciated yen, has led to an obvious drop. By contrast, the German and US companies grow rapidly.

Ranking of Major Global Automotive Infotainment Vendors by Revenue, 2014-2015

(USD mln)	2014	2015
Harman	4,031	4,320
Contineta l	2,850	3,210
Pioneer	3,236	3,125
Alpine	2,675	2,530
Clarion	1,655	1,690
Bosch	1,120	1,200
Mobis	950	1,030
Delphi	960	1,210
Visteon	620	780
Panasonic	4,830	4,510
Fujitsu TEN	2,310	2,180
AisinAW	1,320	1,430
Denso	1,610	1,410
JVCKENWOOD	960	810
Garmin	620	510
Bose	720	660

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