Global and China Telematics Box (T-Box) Industry Report, 2016-2020

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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

T-box, posing the same strict requirements as the vehicle on reliability, working temperature, anti-interference, and so forth, is a standard terminal for the connected car, providing diversified online applications like vehicle remote monitoring, remote control, safety monitoring and alarming, and remote diagnosis by means of 4G remote wireless communication, GPS satellite positioning, acceleration sensing and CAN communication functions.

With the popularity of telematics as well as the demand of new energy automakers on real-time information about battery and vehicle status, the global T-box market size will be up to USD3.4 billion in 2020, with a CAGR of 25% or so, according to our forecast. The entry of the internet industry will drive the growth of such market as well.

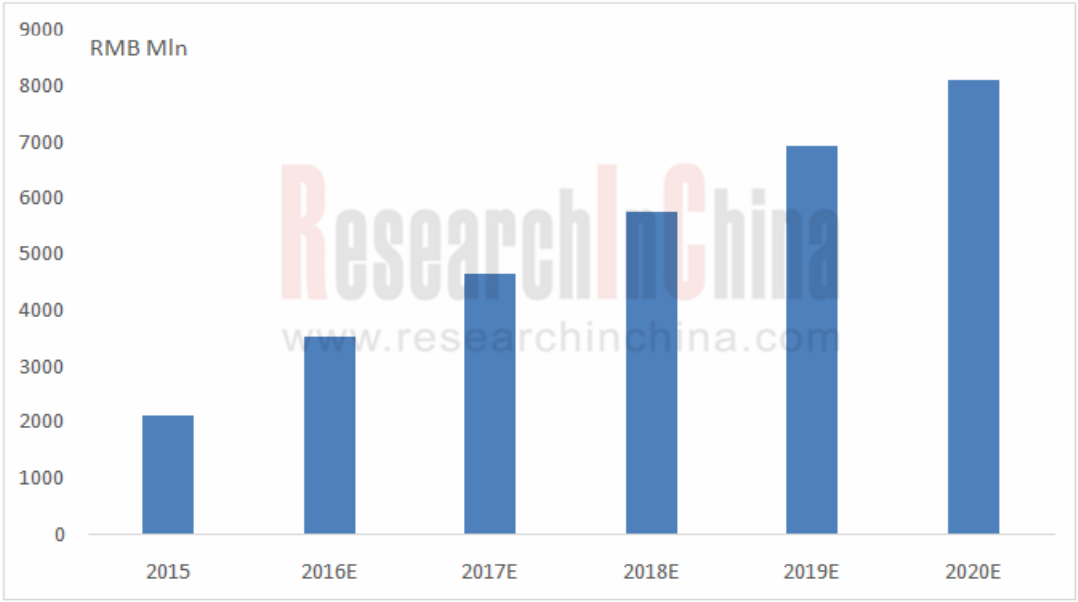
The world's IC market size was approximately USD287.1 billion in 2015, of which the automotive IC market accounted for 7.3%; and in 2019 the IC market scale will climb to USD358.7 billion, but the automotive IC market share will edge up 0.8 percentage points from 2015 and the size is to hit USD29.2 billion mainly because of the gradual fall in the cost and price of automotive IC, especially MCU, analog components, the logic components for special applications, etc.

In the automotive electronic system, the in-vehicle electronics have seen a rising share year after year, with the share 2% higher in 2015 than that in 2011. The automotive electronic system occupies at most 30% of total costs of an ordinary car but makes up more than 50% of total costs of a new energy vehicle. During 2015-2020, the new energy vehicles in China will present a CAGR of 57.6%, giving strong impetus to the development of Chinese automotive electronics market. We believe that the automotive electronics market size of China will show a CARG of over 20% in the next five years and will reach RMB1,000 billion.

]As the output of OEM terminals increases and market competition pricks up, both price and cost of T-box will decrease by degrees. The penetration rate of pre-installations will be 30% in 2020 when Chinese T-box market size is believed to hit RMB8.1 billion.

The main players in T-box field consist of Huawei Technologies, Flaircomm Microelectronics, Thread Tech, etc., yet the rivalry is still mainly from foreign competitors such as Bosch, Continental, Harman, Denso and LG. Still about 95% of T-box market in China is to be developed because CANBUS protocol development is quite difficult. We expect that the detailed national rules and regulations will be issued at the end of 2016, and by then the rate of T-box pre-installations in new energy vehicle will be significantly improved, growing from less than 50% at present to close to 100% as estimated.

China T-box Market Size, 2015-2020E



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Global and China Telematics Box (T-Box) Industry Report, 2016-2020 by ResearchInChina focuses on the followings:

- Global and Chinese T-box market size, shares and development tendencies, particularly analyzing the future technology roadmap of T-box;
- Comparative analysis of T-box makers and applications in countries/regions worldwide;
- Upstream industry chain of T-box: automotive IC and automotive sensor markets;
- Development of automotive electronics market in China;
- T-box market environment, policy climate, etc in China;
- Five key T-box brands and four T-box related manufacturers' technical solutions, T-box business, and otherwise;
- Operation, technologies, development planning of 12 Chinese T-box manufacturers as well as their support for vehicle models.

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