



China Car Navigation Industry Report, 2016

Jul. 2016

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

As consumers have growing awareness of car navigation products as well as telematics develops radically, the global car navigation market witnesses steady development and a higher penetration rate. In 2015, the global embedded automotive navigation system shipment was estimated at 23.9 million sets, with the market size of USD21.6 billion; in 2016, the shipment will reach 25.3 million sets, with the market size up to USD22.6 billion.

From January to May of 2016, China preinstalled 2.074 million sets of car navigation; in 2016, the figure will exceed 5 million sets and hit 5.563 million sets.

Currently, Chinese car navigation map OEMs include NavInfo, AutoNavi (AMAP) and eMapgo Technologies (Beijing); aftermarket map companies embrace Careland, Ritu and NavInfo, among which, NavInfo and Careland occupy the majority of market share in the OEM market and the aftermarket respectively.

In the next few years, China's preinstalled car navigation will jump year by year, with the expected amount of 9.55 million sets by 2020 and the CAGR of 15% in 2016-2020.

The increase of preinstallation is driven by the two below:

1. The navigation installation ratio of vehicle models for sale increases steadily

As of May 2016, 4,724 models of passenger cars had been on sale in the Chinese market, including 1,782 models equipped with navigation systems, with the installation ratio of 37.7%; among them, Haval's 130 models had been equipped with navigation systems with the installation ratio of 85%, ranking first. Independent brands, such as Haval, Chang'an, Geely and BYD, played main roles in promoting navigation systems.

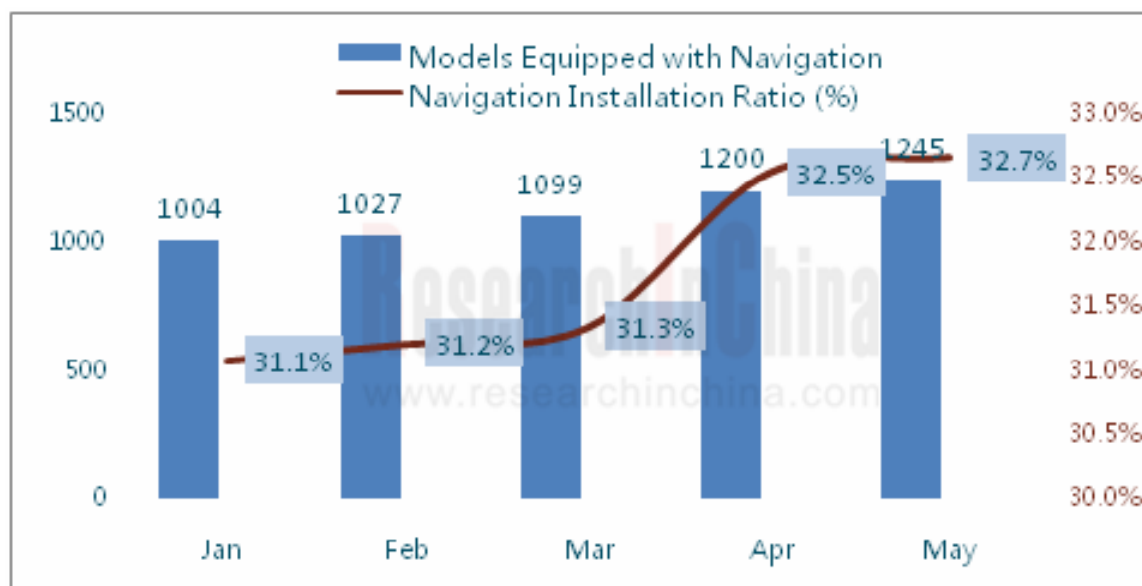
TOP 10 Passenger Car Brands on Sale by Number of Models Equipped with Navigation, as of May 2016

No.	Brand	Models on Sale	Models Equipped with Navigation Systems	Installation Ratio
1	Haval	153	130	85.0%
2	Chang'an	145	95	65.5%
3	Geely Automobile	144	81	56.3%
4	BYD	125	78	62.4%
5	Zotye	118	74	62.7%
6	Chery	106	59	55.7%
7	Audi	119	55	46.2%
8	BMW	70	44	62.9%
9	JMC	80	42	52.5%
10	JAC	96	41	42.7%

2. Automotive navigation has spread gradually from medium and high-end vehicle models to low-end models.

In terms of the navigation installation ratio of vehicle models on sale, 1,245 models tagged with the unit price of RMB200,000 or less were equipped with navigation in May 2016, compared with 1,004 models in January; correspondingly, the navigation installation ratio ascended from 31.1% to 32.7%. This shows that Chinese car navigation has spread gradually from medium and high-end vehicle models to low-end models.

Models Equipped with Navigation and Navigation Configuration Ratio of RMB200,000 (or below) Passenger Cars on Sale, as of May 2016



The report highlights the followings:

- Definition and industry chain of car navigation as well as development overview of BDS;
- Development overview of the global and Chinese car navigation industries, involving market size, competitive pattern, development trend, etc;
- Introduction (including profile, operation, revenue structure, gross margin, R & D investment and related business) to 5 navigation map makers and 16 navigation equipment manufacturers in China;
- Introduction (including profile, operation, revenue structure and car navigation business) to 8 foreign car navigation companies.

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