China Passenger Car Telematics Industry Report, 2016-2020

Aug. 2016

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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

Telematics pre-installations on passenger cars totaled 1.15 million units in China during Jan-May 2016, up 27.8% compared with the same period of the previous year and representing a penetration rate of 12.54%. OnStar rank first with a share of 17.4%, followed by SYNC and In Call. It is worth noting that Chang'anIn Call joined the top three as a self-owned brand, seizing a share of 10.4%. Pre-installations are expected to amount to 2.2 million vehicles in the Chinese market in 2016, creating a market size of over RMB20 billion and marking a penetration rate of 14%. The Chinese Telematics market is expected to exceed RMB50 billion with a penetration rate of above 30% in 2020.

In 2016, along with Chinese passenger car OEMs' stepped-up efforts for marketing of Telematics system, wider use of mobile connect (Carplay, Carlife, Android Auto) and 4G LTE technologies and continuous addition & optimization of Telematics entertainment and internet Connection deliver better customer experience. Interactive speech/HUD projection and active safety ADAS will find more and more infused applications on in-vehicle terminals; large-screen rearview mirror (transition from mainstream 5-inch to 8/10-inch) and large (vertical)-screen dashboard are increasingly favored by customers; mobile connect functions like social apps, navigation, games, entertainment are reflected more and more in in-vehicle terminal system.

Although the Chinese Telematics market has grown at a CAGR of over 25% in recent years, there are still a lot of problems, such as vague Telematics profit model and low renewal rate of consumer terminals for OEM TSP and attempts of transformation by relying on original OEM business by PATEO and China TSP and continuous searching for consumers' pain points in Afertermark by LAUNCH and Carsmart.

China Passenger Car Telematics Industry Report, 2016-2020 focuses on the followings:

- Overview of Telematics (national policies, favorable factors and obstacles, the Chinese Telematics market size, structure of industrial chain, market value chain, market participants, major solutions, etc.);
- Chinese Telematics market (Telematics (by price/auto model/OEM/Telematics brand) pre-installations and penetration on passenger cars, auto makers and models supported by major Telematics brands, major Telematics brands (safety, navigation, connect/entertainment, charges), etc.);
- China-based JV OEMs' Telematics businesses (auto models supported, functions & services, package charges, and Chinese user growth of SAIC-GM OnStar/MyLink, Toyota G-BOOK, Honda Link/Honda CONNECT, Volvo SENSUS/Volvo On Call, Chang'an Ford SYNC, Dongfeng Nissan CARWINGS+/Nismo Watch, Dongfeng Yueda KiaUVO, Dongfeng Citro?n Connect, Dongfeng Peugeot Blue-i, Beijing Mercedes-Benz CONNECT, Beijing Hyundai BlueLink, and BMW Brilliance ConnectedDrive);
- Local Chinese OEMs'Telematics businesses (auto models supported, functions & services, package charges, and Chinese user growth of SAIC MotorinkaNet, Chang'an In Call, Geely AutomobileG-Netlink/G-Link, and Chery Automobile Cloudrive);
- Chinese Telematics companies (customers, revenue, revenue structure, and product areas of Navinfo, LAUNCH, PATEO, WirelessCar, China TSP, TimaNetworks, Careland, Carsmart, Beijing YESWAY Information Technology, and AutoNavi, etc.)

Source: China Passenger Car Telematics Industry Report, 2015-2018

Pre-installations of Major Telematics Brands in the Chinese Passenger Car Market, Jan-May 2016

Source: China Passenger Car Telematics Industry Report, 2015-2018

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