



Global In-Vehicle Infotainment Industry Report, 2016

Aug. 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

Global In-Vehicle Infotainment Industry Report, 2016 provides the following:

1. Status quo of China's Automobile Market
2. Technological Development and Trends of Infotainment Industry
3. Global and Chinese In-Vehicle Infotainment Market Size and Forecast
4. Infotainment Supply Chain of Major Global OEMs
5. Competitive Landscape of Chinese Infotainment Companies
6. Global and Chinese Infotainment Companies

Infotainment is defined as head units with navigation in this report. In 2015, the global Infotainment market size approximated USD20.9 billion. In 2016, as the yen appreciated and the euro remained stable, the proportion of connected cars soared, especially in China where the market size rose significantly. It is expected that in 2016 the global Infotainment market size would reach USD22.9 billion, an increase of 9.6%.

The Infotainment market may also grow at a rate of roughly 9.6% in 2017, which is based on the following reasons: Infotainment will become more complicated, and its functions will be further developed. Moreover, most Infotainment will support both CarPlay and Android Auto, and at the same time, the percentage of Embedded LTE Telematics, especially in North America, will further increase.

The yen's sharp appreciation in 2016 had a great impact on the companies whose manufacturing bases are located in Japan, such as Alpine, Pioneer, Panasonic, and Fujitsuten. By contrast, that was beneficial to those that had set up their bases outside Japan. For instance, AisinAW, Denso, and Clarion saw a big rise in revenue. Bosch also scored good results, particularly in GM's supply system. Besides, the supply percentage increased further, especially from Volkswagen.

Bosch's rise led to a decrease in Continental's market share. Continental's supply percentage in Europe's second-tier markets like PSA increased, but with most being low medium-end products. Ford expanded the proportion of Flextronics' OEM production, with some 40% of its Infotainment entrusted to Flextronics. As Infotainment software become increasingly complicated, particularly OTA, a large amount of Infotainment software and hardware will be in the charge of brand carmakers. The advantages of EMS OEM will become more noticeable, and more Infotainment may be manufactured by EMS in the future.

As Chinese carmakers are seizing the SUV market, Chinese Infotainment companies including Roadrover, Soling, Coagent, ADAYO and China TSP have also sprung up.

Global Top 10 In-Vehicle Infotainment Companies by Revenue, 2014-2016

USD mln	2014	2015	2016
Harman	2,810	2,910	3,210
Continental	2,010	2,030	2,060
Bosch	1,620	1,810	2,060
Denso	1,680	1,820	2,010
Alpine	2,030	1,760	1,830
AisinAW	1,280	1,440	1,620
Fujitsu Ten	1,480	1,490	1,550
Panasonic	1,060	1,060	1,090
Clarion	830	910	1,080
Delphi	990	1,000	1,020
J&K	730	810	880
Pioneer	820	710	650
HyundaiMobis	670	720	780
Mitsubishi	400	480	520
DESAV	230	360	490
Visteon	360	375	390
Others	1,150	1,335	1,660

Source: Global In-Vehicle Infotainment Industry Report, 2016 by ResearchInChina

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1. Status quo of China's Auto Market

- 1.1 Automobile Sales Volume in China, 2005-2016
- 1.2 Overview of China's Automobile Market, 2016
- 1.3 China's Top 10 Brand Auto (by Model) Makers by Sales Volume, 2016H1
- 1.4 Top 10 Brand Auto (by Model) Makers by Sales Volume, 2016H1
- 1.5 Top 10 Passenger Vehicle Brands by Sales Volume, 2016H1

2. Infotainment Technology Trends

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- 2.3 Connected Car Services Embedded Ratio, 2014 VS 2022
- 2.4 Share of Embedded Telematics LTE, 2014 VS 2022
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- 3.20 Sales Volume of AM Infotainment in China, 2011-2020E
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 - 4.3 AisinAW
 - 4.4 Alpine
 - 4.5 Visteon
 - 4.6 Clarion
 - 4.7 Denso
 - 4.8 Continental
 - 4.9 Bosch
 - 4.10 Delphi
 - 4.11 PIONEER
 - 4.12 FUJITSU TEN
 - 4.13 J&K
 - 4.14 ADAYO
 - 4.15 SVAUTO
 - 4.16 HANGSHENG ELECTRONIC
 - 4.17 Soling
 - 4.18 Skypine
 - 4.19 Coagent
 - 4.20 China TSP

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