

# China Driving Recorder Industry Report, 2016-2020

Nov. 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

Amid growing concerns over fake-traffic-accident frauds and car accidents, the Chinese driving recorder market continues to heat up and develops rapidly. An estimate shows that the driving recorder sales volume in China will reach about 14 million units in 2016 and 35 million units in 2020, which shows great potential for market growth.

With the change in users' spending habits and the explosive growth of telematics in past two years, driving recorder have seen significant changes both in functionality and form.

Functionally, driving recorders have begun to develop towards multifunctional all-in-ones that integrate on-board navigation, e-dog, speech recognition, reversing rearview, and ADAS, etc. At present, the players including Careland, Wokeshi, LNSU, and HUNYDON have released such multifunctional all-in-ones.

In terms of product type, smart rearview mirrors with the function of driving recording have become the mainstream. In 2015, the sales volume of smart rearview mirrors in China totaled 3 million units, accounting for 30% of driving recorders sales, and till 2020 occupying 60% as estimated.

At present, there are more than 30 driving recorder brand vendors, more than 1,000 OEM factories, and over 100 solution providers in China, and key brands include PAPAGO, BLACKVIEW, JADO, Anytek, Careland, First Scene, and Rexing, etc. In addition, the internet giants including Qihoo 360, LeEco, Xiaomi, Tencent, and Alibaba have also involved in driving recorder, which makes competition so fierce that the market is facing a reshuffle.

## Representative Multifunctional Driving Recorders in China

<i>Company</i>	<i>Representative Products</i>	<i>Product Type</i>	<i>Time of Release</i>	<i>Key Features</i>	<i>ADAS Functions</i>
<b>Wokeshi</b>	Mingjing 5677A	Intelligent rearview mirror	Oct. 2015	Beidou navigation, WiFi wireless connection, driving recording, driving route playback, Bluetooth phone, speed detection warning	FCW (Forward Collision Warning), HMW (Headway Monitoring and Warning), LDW (Lane Departure Warning), UFCW (Urban Forward Collision Warning)
<b>Qihoo 360</b>	360 second-generation driving recorder	CDR equipped with display	Mar. 2016	WiFi wireless connection, night vision, parking monitoring, gravity sensing	LDW, FCW
<b>Careland</b>	M550	Intelligent rearview mirror	Jun. 2016	Navigation, e-dog, driving recorder, 4G networking, air control gesture recognition, voice control, front and rear recording, driving rearview, reversing video, K-GO telematics, Bluetooth hands-free	FCW, LDW
<b>LNSU</b>	MD801	Intelligent rearview mirror	Jun. 2016	Driving recording, navigation, voice control, front and rear recording, reversing rearview, Bluetooth pairing, free call, radar speed detection warning	LDW, FCW, and moreover, it supports the setting of lane departure detection sensitivity, forward collision sensitivity, warning mode, warning volume, and many other parameters.

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## Presence of Chinese Internet Companies in Driving Recorder Market

Company	Major Moves	Main Products	Time of Release	Main Functions
<b>Qihoo 360</b>	Qihoo 360 launched its first driving recorder in May 2015 and the second-generation driving recorder and rearview mirror integrating the function of driving recorder in 2016.	360 driving recorder (first generation)	May 2015	Wifi wireless connection, night vision
		360 second-generation driving recorder (Handsome Monkey King edition)	Mar. 2016	Wifi wireless connection, LDW, FCW, night vision, parking monitoring, and gravity sensing
		360 rearview mirror integrating the function of recorder	Sep. 2016	Wifi wireless connection, Gesture sensing Shooting, parking monitoring, night vision, and gravity sensing
<b>Tencent</b>	In October 2015, Tencent and DDPAI jointly launched "QQ IoT driving recorder".			
<b>Alibaba</b>	In October 2015, JADO launched smart rearview mirror "Vision" carrying Alibaba's YunOS-			
<b>Xiaomi</b>	Xiaoyi Technology, an ecological chain enterprise under Xiaomi, released its first driving recorder on November 22, 2015.	Xiaoyi driving recorder	Nov. 2015	LDW, HMW, built-in WIFI, night vision, and gravity sensing
<b>LeEco</b>	LeEco launched its first driving recorder in March 2016.	LeEco driving recorder	Mar. 2016	Collision warning, Front Vehicle Start Alarm, Lane Departure Warning, "headlights on" alarm, night vision, built-in WIFI, Bluetooth function, and gravity sensing

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The Chinese driving recorders are mainly AM products. Driven by the market demand, the models such as BAIC Huansu H2, Cadillac CT6, BYD Qin/Tang, Skoda 2016 Spaceback, and Geely 2016 New Vision have been equipped with driving recorders (standard configuration). In future, a growing number of automakers will install driving recorders (standard configuration), which means that the market demand for OEM driving recorders in China will further expand.

The report highlights the following:

- ⇒ Definition and classification of driving recorders and development history of Chinese driving recorders;
- ⇒ Development of global and Chinese driving recorder industry, and development, sales channels, market structure, competitive landscape, and development trends of the Chinese market;
- ⇒ Chinese driving recorder market segments, including car driving recorder (CDR) equipped with display, non-display WIFI recorder, and smart rearview mirror;
- ⇒ Profile, operation, and driving recorder business of 6 main control chip makers and 23 driving recorder manufacturers.

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