Global and China Automotive Infotainment 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.

Abstract

Global and China Automotive Infotainment Industry Report, 2016-2021 covers the following:
1. Analysis and Forecast of Global and China automotive Infotainment market
2. Analysis and Forecast of Global and China automotive Infotainment industry
3. Status quo and trends of automotive Infotainment technologies
4. 23 key automotive Infotainment vendors

In 2016, the OEM Infotainment market size was estimated at USD24.2 billion, with shipments of about 32.1 million units and the average price of USD754. By 2020, the market size is expected to reach USD31 billion, the shipment about 38.3 million units, and the average price USD809. The main reason for the price increase lies in the adding of multiple features: ADAS (such as reversing video, 360 panorama) and enhanced communication functions (like Telematics system, especially 5G system); meanwhile, the increasingly complicated operating system of Infotainment causes higher and higher development costs, and beyond that, various HMI interfaces, capacitive touch screens, gesture, voice control and so on are developed.

Mobile phones have begun to compete with In-Vehicle Infotainment (IVI). With the popularity of the 4G network, the access speed of mobile phones to the network has been greatly accelerated. People have been accustomed to using mobile phones for the purpose of the Internet surfing, navigation and real-time traffic information, showing strong user stickiness. In this case, it is practical to follow the habits of consumers rather than educating them. The growth rate of IVI is to slow down beyond all doubt.

In 2016, Bosch and Aisin AW outperformed other companies. With a perfect layout in China, Bosch acts as a core supplier of SAIC GM, Shanghai Volkswagen and FAW-Volkswagen (except Audi) which are the top three carmakers in China; although the shipment growth rate was not high, the installation rate rose in 2016. Aisin AW further seized more market share in the supply chain of Audi and GM, grabbed the market share from Harman, Panasonic, Alpine and Pioneer, and attained the shipment of about 1.7 million units (an upsurge of 18%) in 2016. Harman averted its development focus from the medium and high-end market to the medium and low-end market, but the profit defied expectations despite the revenue swelled.

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Ranking of Major Global Infotainment Vendors by Revenue, 2014-2016

(USD mln)	2014	2015	2016
Harman	2,810	2,910	3,170
Bosch	1,620	1,810	2,260
Continental	2,010	2,030	2,060
Denso	1,680	1,820	1,880
Aisin AW	1,280	1,490	1,780
Panasonic	1,710	1,780	1,740
Alpine	2,030	1,760	1,670
Fujitsu Ten	1,480	1,490	1,580
Delphi	890	1,060	1,220
Clarion	830	910	1,060
J&K	910	730	790
Pioneer	820	710	660
Mobis	670	720	730
Flextronic	190	330	590
Mitsubishi	430	480	550
Desay SV	230	360	530
HASE	410	430	450
ADAYO (FORYOU)	310	380	440
Visteon	360	375	373
Coagent	230	275	220

Chinese Infotainment industry can be divided into two camps: foreign and Chinese ones. The foreign camp mainly includes Bosch, Continental Automotive, Xugang Electronics, Harman and Japanese vendors. Bosch mainly serves FAW-Volkswagen, Shanghai Volkswagen and Shanghai GM. Continental targets FAW-Volkswagen and Shanghai Volkswagen. Xugang Electronics has Ford as its key customer. Japanese vendors serve BMW, Mercedes-Benz, Audi and Japanese carmakers, in which Aisin AW and Alpine are more powerful as the main suppliers of Audi. South Korean carmakers are all supported by Mobis. In the Chinese camp, the first-tier vendors embrace Desay SV Automotive, Shenzhen Hangsheng Electronics and Foryou. Desay SV Automotive primarily serves FAW-Volkswagen, FAW Mazda, Great Wall Motor and Chery, and its AM shipment is also high. Hangsheng Electronic cooperates with SAIC-GM-Wuling, Dongfeng Nissan, Dongfeng Venucia, Dongfeng Motor and Geely. Foryou's main customers consist of Great Wall Motor, Geely, SAIC-GM-Wuling and Chery, but Foryou's AM shipment plunges. Coagent Electronics S & T, Pateo, ChinaTSP, Inc. and Sound Technology rank among the second-tier vendors.

Squeezed by the first-tier vendors from Mainland China, Taiwanese vendors (such as Volkswagen's supplier E-LEAD Electronic, Nissan's supplier Join-link International Technogy, Dongfeng Peugeot's supplier Jiangsu Shangyang Electronic Technology Co., Ltd.) lack cost competitiveness and see sharp fall in the revenue.

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Table of contents

Selected Charts

- Global Light Vehicle Sales, 2010-2020
- Global Light Vehicle Sales by Region, 2014-2017
- Automobile Sales in China, 2005-2017
- Top 25 Companies in China by Automobile Sales, 2014-2016
- Top 25 Brands in China by Automobile Sales, 2014-2016
- Global Infotainment Market Size, 2015-2021E
- Global Infotainment Shipment, 2014-2021E
- OEM Automotive Infotainment Shipment in China, 2014-2021E
- AM Automotive Infotainment Shipment in China, 2014-2021E
- Infotainment OS Distribution in the World, 2016/2020
- Infotainment OS Distribution in China, 2016/2020
- Market Share of Major Global and Chinese Speech Recognition Vendors
- Share of Global Infotainment Processor Market (Value), 2016
- Market Share of Automotive Audio-Display Vendors Worldwide, 2016
- Ranking of Major Global Infotainment Vendors by Revenue, 2014-2016
- Market Share of Infotainment Vendors in China (by Shipment), 2016
- Market Share of Automotive Infotainment (incl. Navigation) Suppliers of FAW-Volkswagen (excluding Audi), 2016
- Market Share of Shanghai Volkswagen’s Automotive Infotainment (incl. Navigation) Suppliers, 2016
- Market Share of Shanghai GM’s Automotive Infotainment (incl. Navigation) Suppliers, 2016
- Market Share of SAIC-GM-Wuling’s Automotive Infotainment (incl. Navigation) Suppliers, 2016
- Market Share of Chang'an Automobile’s Automotive Infotainment (incl. Navigation) Suppliers, 2016
- Market Share of Chang’an Ford’s Automotive Infotainment (incl. Navigation) Suppliers, 2016
- Market Share of Dongfeng Nissan’s Automotive Infotainment (incl. Navigation) Suppliers, 2016
- Market Share of Great Wall Motor’s Automotive Infotainment (incl. Navigation) Suppliers, 2016
- China’s Automotive Infotainment (incl. Navigation) Supply Chain

Selected Charts

- Supply Ratio of Toyota’s Major Automotive Infotainment (incl. Navigation) Suppliers, 2016
- Supply Ratio of Honda’s Major Automotive Infotainment (incl. Navigation) Suppliers, 2016
- Supply Ratio of Nissan’s Major Automotive Infotainment (incl. Navigation) Suppliers, 2016
- Supply Ratio of GM’s Major Automotive Infotainment (incl. Navigation) Suppliers, 2016
- Supply Ratio of Ford’s Major Automotive Infotainment (incl. Navigation) Suppliers, 2016
- Supply Ratio of Volkswagen’s Major Automotive Infotainment (incl. Navigation) Suppliers, 2016
- Supply Ratio of BMW’s Major Automotive Infotainment (incl. Navigation) Suppliers, 2013
- Supply Ratio of Mercedes Benz’s Major Automotive Infotainment (incl. Navigation) Suppliers, 2016
- Supply Ratio of Hyundai’s Major Automotive Infotainment (incl. Navigation) Suppliers, 2016
- Harman’s Revenue and Operating Margin, FY2004-FY2017
- Harman's Sales by Segment, FY2010-FY2017
- Harman’s Revenue by Region, FY2006-FY2016
- Harman’s Quarterly Sales and EBITDA Margin, FY2013-FY2015
- Harman’s Quarterly Sales by Segment, 2015-2016
- Harman’s Quarterly Sales YoY Growth by Segment, 3Q2015-4Q2016
- Harman’s Quarterly EBITDA Margin by Segment, 2015-2016
- Harman’s Infotainment Milestones
- Harman’s Car Audio Customers
- Structure (%) of Harman’s Customers, FY2008-FY2016
- Harman’s New Orders, 2016
- Harman’s Manufacturing Bases Worldwide
- Global Presence of Continental’s Automotive Interior
- Continental’s Revenue and Operating Margin from Automotive Interior, 2007-2016
- Revenue of Continental’s Automotive Interior by Region, 2009-2016
- Continental’s Infotainment Milestones

Selected Charts

- Continental's Main Infotainment Customers
- Continental's Position in Infotainment Market
- Pioneer's Shipment by Product, FY2010-FY2017
- Pioneer's Structure Map
- Pioneer's Revenue and Operating Margin, FY2006-FY2017
- Pioneer's Operation Income Structure, 3Q FY2016-3Q FY2017
- Pioneer's Revenue by Division, FY 2007-FY 2017
- Pioneer's Revenue and Operating Margin from Automotive Electronics Division, FY2007-FY2017
- Pioneer's Revenue by Region, FY2012- FY2015
- Pioneer's Forecasts in FY2017: Inventories, R&D Expenses, Capital Expenditures, Depreciation & Amortization
- Close Cooperation between Pioneer and Here in Map Field
- Pioneer's Layout in Autonomous Driving
- Pioneer's Technical Roadmap
- Balance Sheet of Foryou Corporation, 2012-2014
- Revenue and Profits of Foryou Corporation, 2012-2014
- Key Financial Indicators of Foryou Corporation, 2012-2014
- Main Product Output of Foryou Corporation, 2012-2014
- Revenue of Foryou Corporation by Business, 2012-2014
- Customer Distribution of Foryou Corporation, 2013-2014
- Alpine's Revenue and Operating Margin, FY2006-FY2017
- Alpine's Revenue by Business, FY2012-FY2017
- Revenue and Operating Margin of Alpine's Car Audio Division, FY2006-FY2015
- Revenue and Operating Margin of Alpine's Infotainment, FY2005-FY2015
- Alpine's Revenue by Region, FY2005-FY2012
- Alpine's Revenue by Region, FY2014-FY2015

Selected Charts

- Alpine’s Sales by Region, FY2017
- Alpine’s Revenue and Operating Margin for 23 Consecutive Quarters
- Alpine’s Revenue by Segment for 23 Consecutive Quarters
- Overview of Alpine’s Companies in China
- Clarion’s Revenue and Operating Margin, FY2006-FY2017
- Clarion’s Revenue by Region, FY2009-FY2017
- Distribution of Clarion’s Production Bases
- Clarion’s Organizational Structure in China
- Delphi’s Recent Acquisitions and Platforms
- Delphi’s Revenue and Operating Margin, 2007-2016
- Delphi’s Operating Margin by Division, 2013-2016
- Delphi’s Customer Distribution, 2010-2016
- Delphi’s Revenue by Region, 2010-2015
- Delphi’s Electronics & Safety Segment Revenue Mix by Product
- Visteon’s Quarterly Revenue and Gross Margin for 12 Consecutive Quarters
- Visteon’s Revenue by Product, 2015-2016
- Visteon’s Revenue by Region, 2013-2016
- Visteon’s Revenue by Customer, 2013-2016
- Visteon’s Backlog by Region, by the end of 2016
- Visteon’s Backlog by Product, by the end of 2016
- Visteon’s Revenue in China, 2015-2016
- Vehicle Infotainment Products of Hangsheng Electronics
- Major Customers of PAS
- Revenue of PAS by Region, FY2012
- Panasonic’s Automotive Revenue by Product, FY2012

Selected Charts

- Fujitsu Ten’s Revenue and Operating Margin, FY2005-FY2017
- Fujitsu Ten’s Revenue by Division, FY2005-FY2016
- Aisin’s Customer Distribution, 2016-2017
- Aisin AW’s Revenue and Operating Income, FY2007-FY2017
- Aisin AW’s Navigator Output, FY2008-FY2017
- Navigation Soft Production, FY2014-FY2017
- Aisin AW’s Infotainment Customer Distribution, 2016
- Denso’s Revenue and Operating Margin, FY2006-FY2017
- Denso’s Customer Distribution, Q1-Q3 FY2017
- Denso’s Product Distribution, Q1-Q3 FY2017
- Denso’s Revenue and Operating Income by Region, Q1-Q3 FY2017
- Revenue and Operating Income of Coagent Electronics S & T, 2013-2016
- Revenue of Coagent Electronics S & T by Product, 2013-2015
- Revenue of Coagent Electronics S & T by Business, 2013-2015
- Organizational Structure of Coagent Electronics S & T
- Revenue and Operating Income of Shenzhen Soling, 2011-2017
- Output and Sales Volume of Shenzhen Soling, 2011-2014
- Revenue of Shenzhen Soling by Channel, 2011-2016
- Revenue and Operating Income of JVC Kenwood, FY2009-FY2017
- J&K Sales of Japan Dealer-installed Navigation, FY2014-FY2019
- J&K Sales of Japan Dealer-installed Dashcams, FY2017-FY2019
- Financial Data of Desay SV Automotive, 2013-2015
- Output of Desay SV Automotive by Product, 2013-2015
- Revenue of Desay SV Automotive by Customer, 2013-2015
- Revenue and Gross Margin of E-LEAD Electronic, 2009-2017

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