



**Global and China Telematics Box (T-box)
Industry Report, 2016-2020**

September 2018

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

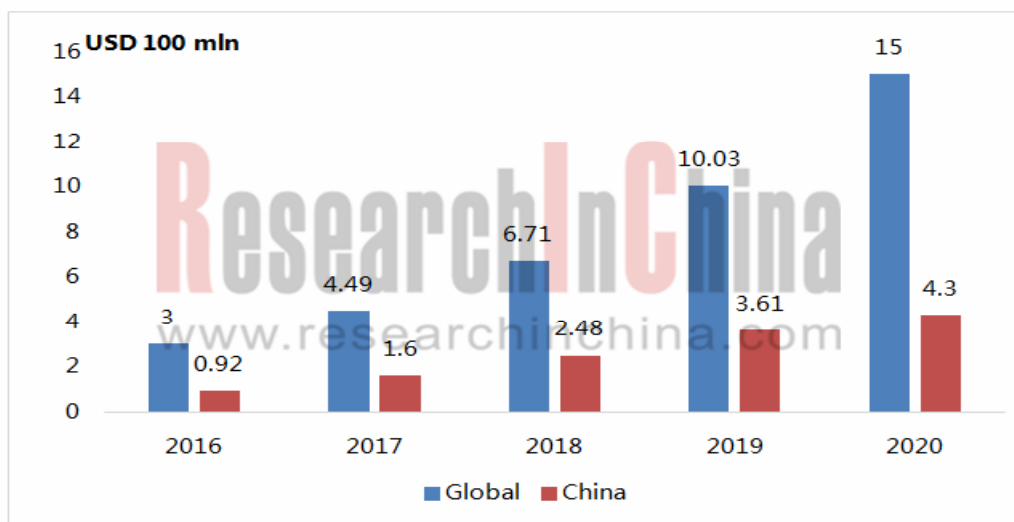
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

T-box is a connected-car-standard terminal that delivers multiple online applications including vehicle remote monitoring, remote control, safety monitoring & warning and remote diagnosis via 4G remote wireless communication, GPS satellite positioning, acceleration sensing and CAN communication.

T-box can be divided into OEM and AM. Regarding OEM, T-box makers provide related services via OEM: has T-box directly connected with CAN Bus, ensure car-grade system, offer complete power supply design and ensure reliability. As to AM, T-box is plugged into car diagnostic port and can replace OBD. In addition, T-box can also be installed by changing original wiring, a way that may bring greater safety risks. Global passenger-car OEM T-box market will swell from USD300 million in 2016 to USD1.5 billion in 2020 at a CAGR of 49.53%. When it comes specifically to China, the passenger-car OEM T-box market is expected to be RMB2.9 billion in 2020. As many carmakers consider “going intelligent & connected” as the direction of future development, T-box installations have increased rapidly.

Global and Chinese OEM T-box Market Size, 2016-2020E



Source: ResearchInChina

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Globally, due to widespread extension of GM OnStar, LG Electronics holds the lion's share. As Harman spares room for Telematics module in its multimedia control system, it occupies a larger share among luxury brands.

Major Global T-box Vendors and Their Customers

T-box Vendor	Carmaker
LG Electronics	GM, Hyundai, Kia
Harman	Mercedes-Benz, BMW, Land Rover, Saab
Denso	Toyota
Continental	Infiniti, Mercedes-Benz, Ford, Nissan
Marelli	Fiat
Visteon	Mazda, Mitsubishi, Renault
Peiker	BMW
Novero	Volkswagen
Actia	Jaguar Land Rover, Volvo

Source: ResearchInChina

Domestic T-box suppliers include Huawei, ZTEWelink, Thread, Flaircomm Microelectronics, Yaxon Network, FutureMove Automotive, Neusoft, INTEST, Jiangsu Tianan Smart Science & Technology and PATEO.

Founded in 2011 and headquartered in Shenzhen, Thread specializes in production and solution design of automotive OBD and T-box products. Its OEM clients include Toyota, Honda, Nissan, GM, Hyundai, Mercedes-Benz, Audi, Great Wall and BAIC with T-box.

Established in 2008 and headquartered in Fuzhou, Flaircomm Microelectronics provides mainly Automotive OEM Bluetooth, WiFi, 3G/LTE wireless communication modules, and T-box. It serves main OEMs and Tier1s like Volkswagen, GM, Chery, JAC, Geely, Desay SV, Clarion, Delphi, Denso Ten, Hangsheng, and Pioneer.

Set up in 2004 and headquartered in Wuhan, INTEST, a subsidiary of Xingmin Intelligent Transportation Systems Group, is engaged mainly in NEV T-box business. Its share of OEM T-box products in the Chinese NEV market was 60% in the first half of 2017. Major OEM customers are BAIC BJEV, Zhongtong Bus, Changan Automobile, Dongfeng Commercial Vehicle, Nanjing Golden Dragon Bus Manufacturing, BYD, Geely Commercial Vehicle, BAIC Foton and Dongfeng Liuzhou Motor.

Global and China Telematics Box (T-box) Industry Report, 2016-2020 highlights the followings:

- ◆ Global and Chinese T-box market (size, status quo & trends, T-box unit price forecast, T-box installation forecast, car sales and forecast, etc.);
- ◆ T-box industry chain (MCU, mobile communications unit, CAN module, acceleration sensor, shock sensor, and flash memory) (overview, major suppliers, etc.)
- ◆ Major global T-box vendors (revenue, net income, main business, T-box business, supporting, etc.);
- ◆ Major domestic T-box vendors (profile, T-box products, supporting, partners, etc.).

1 Overview of T-box

- 1.1 Definition
- 1.2 Classification
- 1.3 Working Principle
- 1.4 Composition
- 1.5 Function

2 T-box Market

- 2.1 Global T-box Market
 - 2.1.1 Market Size
 - 2.1.2 Suppliers
 - 2.1.3 Development Trend
- 2.2 Chinese T-box Market
 - 2.2.1 Market Environment
 - 2.2.2 Policy
 - 2.2.3 Market Size
- 2.3 Upstream Industry Chain
 - 2.3.1 MCU
 - 2.3.2 Mobile Communication Unit
 - 2.3.3 CAN Module
 - 2.3.4 Acceleration/Shock Sensor
 - 2.3.5 Flash Memory

3 Global T-box Companies

- 3.1 Denso
 - 3.1.1 Profile
 - 3.1.2 Business Overview

- 3.1.3 T-box Business
- 3.2 Continental
 - 3.2.1 Profile
 - 3.2.2 Business Overview
 - 3.2.3 T-box Business
- 3.3 Harman
 - 3.3.1 Profile
 - 3.3.2 Business Overview
 - 3.3.3 T-box Business
- 3.4 Visteon
 - 3.4.1 Profile
 - 3.4.2 Business Overview
 - 3.4.3 T-box Business

4 Chinese T-Box Companies

- 4.1 Huawei Technologies Co., Ltd.
 - 4.1.1 Profile
 - 4.1.2 Operation
 - 4.1.3 T-box Business
- 4.2 Shenzhen ZTEWeLink Technology Co., Ltd.
 - 4.2.1 Profile
 - 4.2.2 T-box Business
- 4.3 Shenzhen Thread Technology Co., Ltd.
 - 4.3.1 Profile
 - 4.3.2 T-box Business
- 4.4 Flaircomm Microelectronics, Inc.
 - 4.4.1 Profile

- 4.4.2 T-box Business
- 4.4.3 Supporting Clients
- 4.5 Xiamen Yaxon Network Co., Ltd.
 - 4.5.1 Profile
 - 4.5.2 T-box Business
- 4.6 FutureMove Automotive Co., Ltd.
 - 4.6.1 Profile
 - 4.6.2 T-box Business
 - 4.6.3 Partners
- 4.7 Neusoft Corporation
 - 4.7.1 Profile
 - 4.7.2 T-box Business
- 4.8 Wuhan Intest Electronic Technology Co., Ltd.
 - 4.8.1 Profile
 - 4.8.2 T-box Business
- 4.9 Jiangsu TIANAN Smart Science & Technology Co., Ltd.
 - 4.9.1 Profile
 - 4.9.2 T-box Business
- 4.10 PATEO
 - 4.10.1 Profile
 - 4.10.2 T-box Business

- Place of TCU/T-box in Telematics
- Composition of T-box
- Alerting Function
- Cloud Service Function
- Remote Control Function
- Information Feedback Function
- System and Self-check
- Global and Chinese OEM T-box Market Size, 2016-2020E
- Market Share of Global TCU Brands, 2017
- Supply Relationship of Global Major T-box Vendors
- Automotive Electronics as a Percentage of Total Costs of an Electric Vehicle
- China's Passenger Car Sales, 2016-2020E
- China's Installation of T-box in Passenger Cars, 2016-2020E
- Unit Price of T-box in China, 2016-2020E
- T-box Market Size in China, 2016-2020E
- Applications of MCU by Bite
- Global MCU Market Size, 2013-2020E
- TOP8 MCU Vendors
- Classification of Mobile Communication Units
- Major Mobile Communication Unit Suppliers
- Major CAN Module Suppliers
- Major Acceleration/Shock Sensor Suppliers
- Major Flash Memory Suppliers
- Overview of Denso
- Denso's Revenue and Net Income, 2015-2018

- Denso's Automotive Business
- Denso DCM Modules
- Denso V2X Communication Modules
- Overview of Continental
- Continental's Revenue and Profit Margin, FY2015-FY2017
- Continental's Business
- LTE Telematics Module
- Premium Telematics Module
- Entry Telematics Module
- Overview of Harman
- Harman's Automotive Business
- Overview of Visteon
- Visteon's Financial Results, 2013-2017
- Visteon's Core Business
- Visteon's T-box Business
- Overview of Huawei
- Huawei's Operation, 2011-2017
- Overview of Shenzhen ZTEWeLink Technology
- Appearance of Shenzhen ZTEWeLink Technology's T-box
- T-box Products of Shenzhen ZTEWeLink Technology
- Overview of Shenzhen Thread Technology
- Appearance of Thread 4G Connected T-box Terminal
- Structure of Thread T-box Hardware
- 4G Connected T-box Terminals for Connected Vehicles
- Appearance of Thread 2G Car-sharing T-box Terminal for New Energy Vehicle

- Thread 2G Car-sharing T-box Terminals for New Energy Vehicles
- Overview of Flaircomm Microelectronics
- T-box Roadmap of Flaircomm Microelectronics
- Appearance of Flaircomm Microelectronics TCU1.0
- Appearance of Flaircomm Microelectronics TCU2.0
- OEM Automakers Equipped with Flaircomm Microelectronics' T-box
- Automotive Electronics Manufacturers Equipped with Flaircomm Microelectronics' Bluetooth/WiFi or T-box
- TSP Partners of Flaircomm Microelectronics
- Operators in Partnership with Flaircomm Microelectronics
- Vehicle Models Supported by Flaircomm Microelectronics
- Overview of Xiamen Yaxon Network
- Xiamen Yaxon Network's T-box Products
- Xiamen Yaxon Network's T-box Product Lines
- Overview of FutureMove Automotive
- FutureMove Automotive's ConnectedEngine
- Partners of FutureMove Automotive
- Overview of Neusoft Corporation
- Functions of Neusoft Corporation's T-box
- Mobile APP Interface of T-box
- Neusoft Corporation's T-box Ecosystem
- Overview of Wuhan Intest Electronic Technology
- INS-7000
- INS-7000 Products
- INQ-1000

- INQ-1000 Products
- JKC
- JKC Products
- 4G T-BOX
- 4G T-BOX Products
- Overview of Jiangsu TIANAN Smart Science & Technology
- T-box of Jiangsu TIANAN Smart Science & Technology
- Overview of PATEO Corporation
- PATEO CORE Platform
- Functions of PATEO CORE Platform
- PATEO CLUSTER
- Vehicle Models Equipped with PATEO T-box

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