

Global and China In-Vehicle Infotainment (IVI) Industry Report, 2020-2026

June 2020

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

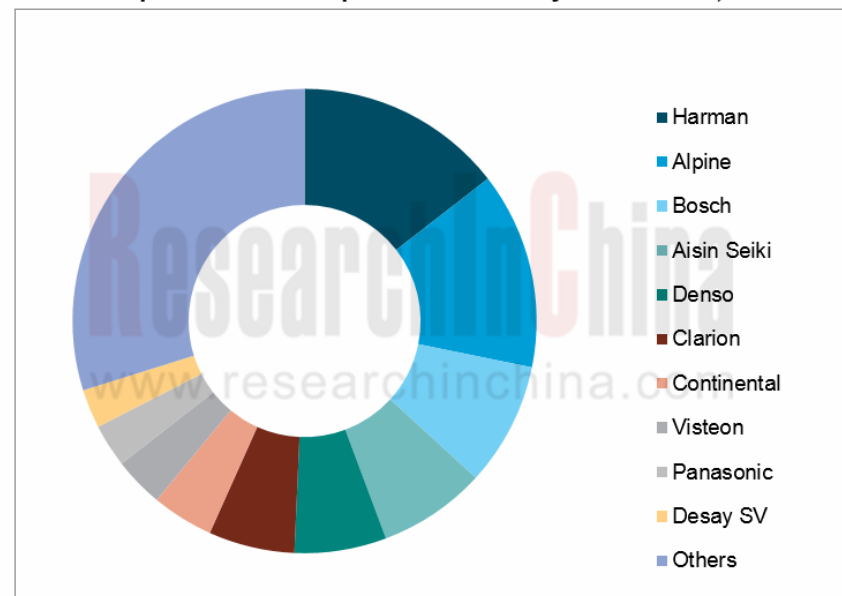
In recent years, the in-vehicle infotainment (IVI) industry is undergoing profound changes, evolving from pure amusement like radio, audio and video to a versatile smart terminal that can process more complex information. IVI system will be a key portal for telematics services.

The global IVI system (incl. display) market was worth \$19.6 billion in 2018, a figure projected to \$20.8 billion in 2019 and soar to \$29.2 billion in 2026 amid ever higher penetration, functional richness as well as multi-screen and large-screen tendencies.

China's IVI system market was estimated at RMB42.09 billion with a penetration rate of about 69% in 2019. Due to the policy incentives to Telematics, IVI system acting as the entrance of Telematics will surely see a rising penetration rate and by 2026 expectedly to 95%, and the market size will reach RMB61.2 billion.

The global IVI system market is a full-fledged one featuring fierce competition and low concentration, where the players encompassing parts suppliers such as Bosch, Continental and Delphi and electronic vendors like Harman, Alpine, Pioneer and Clarion.

Competitive Landscape in Global IVI System Market, 2019



Source: ResearchInChina

As latecomers, Chinese manufacturers mainly step into the IVI system from the aftermarket, but they are turning to the OEM market from the aftermarket with the strides in technology. Chinese competitors like Desay SV, Foryou Corporation, Hangsheng Electronics have made rapid strongholds in the OEM market over the recent years. Desay SV, the leader in local Chinese IVI system, enjoyed 2.7% of the global market and 9.6% of the Chinese market in 2019.

Telematics grows an orientation of IVI system. Thanks to favorable policies and robust demand, Telematics assembly rate is on a steady rise in China, reaching 37.6% in Q1 2020 with an upswing of 6.3 percentage points on a like-for-like basis. It is put forward in the Intelligent Vehicle Innovation Development Strategy (Draft) issued by the National Development and Reform Commission (NDRC) in 2018 that intelligent connected vehicle (ICV) should occupy 50% of new cars in China by 2020, but the goal will be achieved by the end of 2020.

Highlights of the report:

- ◆ Global and China automobile industry;
- ◆ Global and China IVI system industry (status quo, competition pattern, supply, telematics analysis);
- ◆ 23 global and Chinese companies (operation, IVI system business, etc.)

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