

# Global and China Automotive Audio and Navigation Industry Report, 2011-2012

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## Abstracts

Global and China Automotive Audio and Navigation Industry Report, 2011-2012 covers the followings:

Brief Introduction of Automotive Audio

Brief Introduction of Telematics

Global Automotive Market and Industry

China Automotive Market and Industry

Global and China Automotive Audio Market and Industry Analysis

Global and China Automotive Navigation Market and Industry Analysis

Research on 23 Major Automotive Audio and Navigation Manufacturers

Generally, low and medium-end passenger cars are only equipped with simple audio system, including one head unit with digital receiver and CD play functions, one dual-channel power amplifier, ordinary crossover and two to four loudspeaker units; most commercial vehicles have no CD player; navigation function is added to high-class cars, which stores electric map in DVD in early stage, but in HDD and flash memory card in recent years.

Audio performance of high-class cars has been improved a lot, with four to eight

channels for power amplifier, accompanied by increased power for each channel, and loudspeakers can outnumber ten at most. For luxury cars, wireless communication functions involving 3G, telematics, Bluetooth, WiFi, etc. as well as the rear seat entertainment system have been added, usually, this system is referred to as Infotainment.

In 2011 and first half of 2012, Japanese manufacturers performed outstandingly in the fields of automotive audio and navigation, especially in the latter. Although attacked by the 3.11 Earthquake, Thailand flood and the appreciation of Japanese yen in 2011, the Japanese car navigation shipment merely dropped 7.4%, and the shipment of navigation equipment storing electronic map in flash memory even went up by 18.1%. In the first half of 2012, Japan's local car navigation shipment amounted to 3.022 million units, a rise of 146.3% over the same period of last year. In the traditional automotive audio field, the Japanese manufacturers have further expanded their market occupancy, e.g., Pioneer's car CD player shipment saw an increase of 26.9% in 2011, up to seven million units. In the fields of automotive audio and navigation, Japanese manufacturers, except FUJITSU TEN, all witnessed revenue growth in 2011, moreover, the growth rate in the first half of 2012 all exceeded 10%.

The Japanese manufactures not only monopolize the audio and navigation markets of Japanese car manufacturers, but also take up an increasing proportion in the European and American markets. Mercedes-Benz, for example, C-CLASS/E-CLASS/GLK-CLASS uses audio and navigation of Mitsubishi Electric, GL-CLASS/M-CLASS adopts audio and navigation of Alpine, which is also the second largest supplier of car audio and navigation for BMW; Audi TT employs audio and navigation of Aisin AW; American manufacturers such as GM use Denso's navigation, involving CHEVROLET VOLT/Avalanche/Suburban/Corvette/Silverado/Tahoe Hybrid; navigation of Buick LACROSSE and CADILLAC SRX is also provided by Denso, so does Land Rover; Ford applies a lot of Clarion navigation.

As for American manufacturers, only Harman maintains steady growth. It occupies the luxury market, and is well-known for its Infotainment, which is applied in Audi A4/A5/Q5/Q7/S4/A6, Volkswagen Touareg/Routan and Porsche.

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