

Portable Navigation Industry Report, 2006-2007



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The market demand for navigation devices and GPS soared. Although the main civilian consumption market of navigation devices is still the vehicle navigation, the proportion of the personal leisure navigation devices is boosting up as well. Meanwhile, the integral vehicle navigation device has transferred to PND in vehicle navigation market since 2001, and this kind of portable device can be taken with, as well as used in the vehicle.

Under the drive of the strong market demand, the operating performance of the three leaders, Tom-Tom, Garmin and Mitac, in PND market, all increased rapidly in 2005 and 2006. The annual revenue of Tom-Tom was nearly USD 1.6 billion in 2006, while that was just USD 10 million in 2002; the shipment of Garmin navigation devices was 389.9 thousand units in 2005 and, that amounted to 1.443 million units in 2006, up 270.1% year-on-year. Moreover, Taiwan ODM Mitac is not only the OEM of Tom-Tom and other makers, but it has its own brand Mio, and since acquired Europe-based Navman in 2007, the market share of Mio and Navman was increased to nearly 20% in 2006, which made Mitac rank to the 2nd place in Europe market just after Tom-Tom. The market concentration of PND is comparatively high in the world and, the market share of Tom-Tom, Garmin and Mitac totaled 70% plus.

The Europe PND market is with the fastest increase in the world in 2005 and 2006, the total sales of PND products amounted to 7.4 million units in West Europe in 2006, and it is forecasted that will increase to 11.8 million units in 2007. The year of 2006 saw two peak seasons in PND sales in West Europe, one is from June to August, the consumers bought a large number of PND for the convenience in holiday traveling; and the other was at the end of 2006, the traditional sales peak season, the PND product sales during Christmas accounted for 8% of the total.

The average price of PND in West Europe market was EUR 417 in 2006 and, the price in Switzerland market was the highest, about EUR 413, and the prices in France and UK both decreased about 20% to EUR 364-367, while that remained EUR 351 in German market. The prices in the whole West Europe market all dropped to some extent in 2006, German market decreased EUR 43, while Spain market was with the largest drop margin, and the average price descended to EUR 287 in the end of 2006 from EUR 472 in the end of 2005.

North America Market is still dominated by Garmin, which remained the 1st place in the market by 50.3% of market share in 2006, and others such as Magellan, Tom-Tom, Mio, Lowrance, and Destinator etc, controlled large of the left. Sony, which entered America vehicle portable navigation device market on Apr 9th, 2006, obtained 2% of the market share as well.

Japan market has the highest vehicle navigation product configuration rate in the world, while the market share of PND products is much less than the former vehicle integral navigation. In China, the polarization of the navigation market is comparatively apparent, as Chinese Taiwan navigation industry ranks the world leading level either in scale or scientific level, and nearly all the navigation manufacturers have OEMs in Taiwan. Taiwan Mitac not only has huge outsourcing business, but its own brand, Mio, also has outstanding performance in Europe and America markets. Meanwhile, the navigation industry in mainland China is still in cultivation period, especially the portable navigation market. Currently, the manufacturers of the household electric appliance, MP3, cell phone and other fields are playing an important role in the navigation industry, while the professional navigation product manufacturers are relatively embarrassed.

The present portable navigation product price has dropped dramatically in China, and the ones below RMB 2000 are not rare, so the product price has not been the barrier for PND market development. In addition, as the consumers' recognition to the navigation products and the gradual maturation of China navigation industry chain, the prospect of China portable navigation market would be promising and bright in the future.

Table of Content

1 Overview and Trend of Global PND Industry

1.1 Europe

1.2 North America

1.3 Asia

2 PND Industry Chain

2.1 PND Product Classification

2.2 PND Industry Chain

2.2.1 PND Industry Chain Structure

2.2.2 Development of Key Links of PND Industry Chain

2.3 China PND Industry Development Trend in 2007

3 PND Application Market

3.1 Navigation Cell Phone

3.2 Single-function Portable Navigation Device

3.3 PNA

3.4 GPS Bluetooth

3.5 Other Portable Navigation Devices

4 Global Portable Navigation Device Manufacturers

4.1 Navigation Cell Phone Manufacturers

4.1.1 NOKIA

4.1.2 Dopod

4.1.3 Philip

4.1.4 Cell Phone Design Companies

4.2 Single-function Navigation Device Manufacturers

4.2.1 Garmin

4.2.2 Magellan

4.2.3 Trimble

4.2.4 Navigon

4.2.5 Medion

4.3 PNA Manufacturers

4.3.1 TOM-TOM

4.3.2 Mitac

4.4 GPS Bluetooth Module and Other Manufacturers

4.4.1 CSR

4.4.2 Ledtek

4.4.3 SEG

4.4.4 RoyalTek

4.4.5 Holux

4.4.6 GLobalsat

4.4.7 Boshuo

4.4.8 SECUGIS

4.4.9 JJTECH

5 Upstream Manufacturers of Global Portable Navigation Industry

5.1 GPS Chip Manufacturers

5.1.1 SirF

5.1.2 STMicroelectronics

5.1.4 Maxim

5.1.5 ATMEL

5.1.6 SIGE

5.1.7 Xemics

5.1.8 Nemerix

5.1.9 RFMicroDevices, Inc. (RFMD)

5.1.10 Ublox

5.2 Navigation Software Manufacturers

5.2.1 ROUTE 66

5.2.2 TOM-TOM

5.2.3 Gate5 AG (NOKIA)

5.2.4 Destinator

5.2.5 Maction Technology

5.2.6 Maxwell

5.3 Navigation Map Manufacturers

5.3.1 NavTeq

5.3.2 TeleAtlas

5.3.3 Zenrin

5.3.4 MapMaster

5.3.5 IPC

5.3.6 NavInfo

5.3.7 Ritucom

5.3.8 Shanghai Changxiang

5.3.9 Beijing Gaode

5.3.10 Careland

5.3.11 Lingtu

5.3.12 Geo

5.3.13 Emapgo

5.3.14 National Geomatic Center of China

Tables/Figures

Global Portable Navigation Device Market, 2004-2010

Recognition of Navigation Products in Europe

Europe PND Industry Increase, 2003-2008

PND Sales in Main European Countries, 2005-2006

Navigation Industry Competition Layout in Europe

Main Classification of PND Products

Comparison of PND Vehicle Product Performance, Configuration and Price by Type

Comparison of PND Product (with TMC Function) Performance, Configuration and Price by Type

Upstream and Downstream Structure of PND Industry Chain

Main Frame Structure of GPS Chip

Global Navigation Smart Phone Shipment, 2004-2010

NJ2020 and NJ1006A A-GPS Solution

Single-function Portable Navigation Device Sales Trend, 2004-2010

Global PNA Shipment, 2004-2010

Finance of Trimble, 2002-2006

Revenue of Trimble by Division, 2002-2006

Main Products of TOM-TOM

PND Shipment Forecast of TOM-TOM, 2007
TOM-TOM Navigation Product Sales, 2002-2006
TOM-TOM Sales Revenue, 2002-2006
Sales Revenue of TOM-TOM Navigation Products by Segment, 2005-2006
Average Sales Price of TOM-TOM Navigation Products, 2005-2006
Regional Distribution of TOM-TOM Navigation Product Sales, 2005-2006
TOM-TOM Employees Regional Distribution, 2005-2006
Operation Revenue of Taiwan Mitac, 2005-2006
Mitac Navigation Product Shipment and Forecast, 2004-2007
CSR Sales Revenue, 2003-2006
SEG G2046 Cell Phones
RoyalTek Product Composition
RoyalTek International Operation Performance, 2005-2006
Operating Performance of Holux, 2002-2006Q3
Regional Distribution of Holux Sales Income
GLobalsat Operation Performance Statistics and Forecast, 2003-2007
GLobalsat Revenue Composition by Product
Ratio of GLobalsat PND Product to Operation Revenue, 2006Q1-2007Q4
Cell Phone GPS Chip Price Trend, 2006-2010
SIRF Sales, 2003-2006H1
SIRF Sales Revenue by Region, 2006Q1
STMicroelectronics Sales by Product, Jan-Sep 2006
STMicroelectronics GPS Application
Maxim Operating Performance, 2001-2007Q1
SiGe Sales Revenue, 2002-2006
Typical Application of Nemerix GPS Chip Set
Typical GPS Receiver based on NJ1x36
Nemerix NJ2020
TOM-TOM Sales Revenue, 2002-2006
TOM-TOM Sales Revenue by Product, 2006
NAVTEQ Sales Revenue, 2001-2005
NAVTEQ Sales Revenue, 2005Q3-2006Q3
NAVTEQ Gross Profit, 2005Q3-2006Q3
Sales Revenue by Region, 2006Q3
Navigation Product Sales Statistics and Forecast in West Europe, 2004-2009
Tele Atlas Navigation Map Covered Area and Planned Coverage, 2006-2008
Tele Atlas Sales Revenue, 2001-2006
Tele Atlas Sales Revenue by Product, 2004-2005
Main Products of Zenrin
Map Database Level Structure of Zenrin
Zenrin Performance, 2002-2006
Zenrin Performance, 2001-2006
Zenrin Performance, 2005-2007H1
Zenrin Sales Revenue by Product, 2001-2006F
Zenrin Navigation Electronic Map Sales Revenue, 2001-2006F
Zenrin Navigation Electronic Map Operation Profit, 2001-2006F
Mapmaster Shareholder Composition
Mapmaster Sales Revenue, 1998-2005
Main Business of IPC
Careland I-Spatial Frame Structure
Careland X-Bridge Frame Structure
Careland Vehicle Integral Operation System Carnix Frame Structure
Careland Open Navigation Platform Navi-Core Frame Structure
Lingtu VRMap Product System
Sm@rtIMS 4.5 Network Map Issuance Platform Structure

vSm@rtGPS3.0 Network For NT System Structure
Sm@rtGPS3.0 Network For LINUX System Structure
Geo Employees Qualification Composition
Geo Star 4.0 Integral System Structure
Emapgo Product Application Field
Database of National Geomatic Center of China
PND Product Sales and Growth Rate in Main European Countries, 2006
Top Five PND Manufacturers in America, 2006
Nokia N95 Specification
Main PND Products and Characteristics of Nokia
DOPOD P100 Specifications and Indices
DOPOD P800 Specifications and Indices
Basic Information of Mitac
Mitac PND Sale Regions and Clients
Ledtek GPS9553X
RoyalTek GPD Product Sales
Holux Operation Revenue by Product, 2005-2006
Comparison of Four Taiwan-based GPS Manufacturers (Ledtek, RoyalTek, Holux and Mitac)
GLobalsat Sales Revenue by Region
SECUGIS GPS Products
Global CPS Chip Manufacturers
CPS Chip Set Products
CPS Software Products
STA2051 Performance
STA2056 Performance
Maxim CPS Chip Products
ATMEL GPS Chip
Latest Trend of ATMEL GPS Chip
SiGe SE4100L Product Indices
SiGe SE4110L Product Indices
Xemics GPS Product Performance and Explanations
Performance Comparison between XE1610 and Sirf II
RF8900 Performance and Characteristics
U-blox GPS Module Products
Comprehensive Comparison of U-blox Products
TOM-TOM Operation Cost, 2002-2006
TOM-TOM Sales Revenue and Gross Profit Rate, 2006Q1-Q3
TOM-TOM Product Sales Amount and Average Price, 2004-2005
TOM-TOM Sales Amount by Product, 2006Q3
TOM-TOM Sales Revenue by Region, 2006Q3
Main Products of Maction Technology
NAVTEQ Navigation Electronic Map Sales Volume and Segmentation, 2006Q3
Core Data Amount of Tele Atlas Navigation Electronic Map
Tele Atlas Sales Revenue, 2006Q3
Tele Atlas Sales Revenue, 2006Q1-Q3
Tele Atlas Sales Revenue by Product, 2006Q3
Tele Atlas Sales Revenue by Product, 2006Q1-Q3
Tele Atlas Sales Revenue by Region, 2004-2005
Tele Atlas Segmentation Sales Revenue by Region, 2004-2005
Company Profile of Zenrin
Total Assets and Employee Amount of Zenrin, 2001-2006
Company Profile of Mapmaster
Company Profile of IPC
Main Clients of IPC
Summary of IPC Shanghai Branch

Main New Clients of NavInfo
Events of Ritucom
Ritucom CarNav Navigation Products
Main Products of Ritucom
Successful Cases of Ritucom
Main Projects of Ritucom
Partners of Ritucom
Successful Cases of Geo
Specific Application of Emapgo Products
Map Making by Scale
Digital Map Products of National Geomatic Center of China

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