

Portable Navigation Industry Report, 2006-2007

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Abstracts

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.

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