

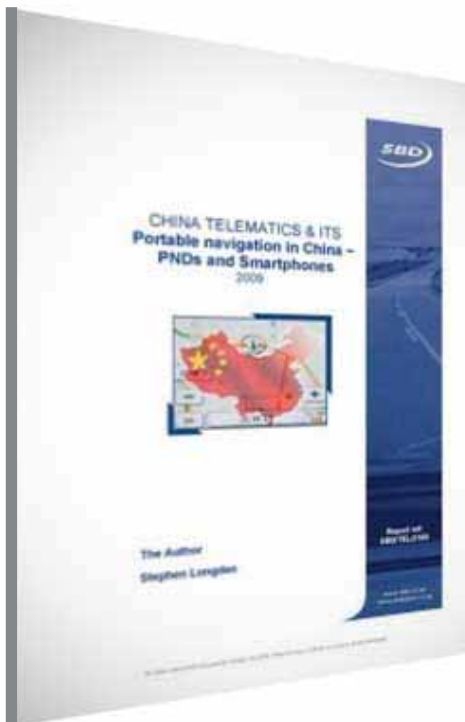
## Rival technologies and vendors compete for China's portable navigation market



### A valuable insight into China's ultra-competitive PND market and the disruptive potential of GPS-equipped Smartphones.

This report provides a detailed overview of the portable navigation markets in China. It analyses the key industry and product trends for PNDs and Smartphone navigation applications and identifies the main vendors who are expected to lead the continued market growth.

The report balances sales forecasts and pricing analysis with technical details of the latest features and traffic services, always with a keen focus on understanding what makes China different to the rest of the world.



### The report will help you to understand the unique characteristics and dynamics of the portable navigation markets in China:

- Why is portable navigation growing in China and how will the market be affected by the current economic difficulties?
- Who are the leading vendors and what is their relationship with China's home-grown digital mapping companies?
- What delivery channels are available for traffic information and who are the leading service providers?
- What navigation applications are available for Smartphone users and what features are the most widely used?

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## »» Portable navigation in China...


The market for navigation of all types is growing rapidly in China. However, portable navigation products such as Portable Navigation Devices (PND) and Smartphones are accelerating faster than OE embedded navigation systems.

SBD's new report, *Portable navigation in China ~ PNDs and Smartphones*, analyses this growth, assesses emerging technologies and identifies the leading brands in China.

The report provides a detailed overview of portable navigation in China including market share, pricing, growth forecasts and a comparison between the PNDs and Smartphone navigation products.

The market growth in China is down to a number of factors including the spread of vehicle ownership to a new emerging middle class that sees the value in having navigation but is not prepared to pay for full OE embedded systems. Increased ownership of Smartphones is also allowing consumers to use them for navigation applications.

Shinco GPS	
Company name	Shinco Electronics Group
Brand name	Shinco GPS
Website	www.shinco.com
Map supplier	Autonavi
Example model	M-201
Connectivity	CMRMB mobile TV FM radio
Display	4.3 inches
Operating system	Windows CE 5.0
Navigation software	Shinco
Route search	Options: recommended, fastest, shortest
HMI	Pinyin and handwriting destination input
Destination identification	Phone number, point of interest, street address, road intersection
Safety feature	Driver warnings for speed limit, traffic control signals, accident danger zone.



Profiles of the leading PND brands with details of their product features and functionality.

Navigation system	Sales estimate 2008		
	World	China	China as % of world total
PND	40 million	1.8 million	4.0
OE Embedded	8 million	700,000	8.75
Smartphone with GPS	78 million	3 million	3.8

Although a definite success story, China's portable navigation market is facing an increasing threat from digital map piracy, very low cost unbranded products and HMI issues. The report therefore focuses on the key features that consumers use to differentiate between low quality offerings and the more sophisticated mainstream products that are beginning to dominate.

Traffic information is identified as a key functionality for both PNDs and Smartphones. The report investigates the emerging channels for the delivery of this important value-added service.



# »» ...know what tomorrow brings

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SBD are committed to providing you with a comprehensive combination of strategic analysis and raw data. Our aim is to enable growth through knowledge by:

- Helping you grow your business by giving you the reassurance of knowing which technologies you should develop
- Helping you reduce your costs by saving you both planning and implementation time

## ...about the report author



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Stephen achieved an MSc in Transport Planning and Management at the University of Westminster, before becoming the editor of *The Intelligent Highway* magazine. At SBD, Stephen specialises in research and analysis into automotive telematics and navigation. He has investigated a variety of ITS applications and is widely regarded as an expert on emerging markets such as China and emerging initiatives such as eCall.

## Feedback Form - "Portable navigation in China - PND's and Smartphones" (Ref: 2180)

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## Related Reports



### China OE embedded navigation

The demand for OE embedded navigation in China is increasing rapidly, presenting an 'as yet untapped' revenue stream for all stakeholders. However, success requires careful planning and a thorough knowledge of not only the market trends, but also the opportunity for bespoke partnerships and specific consideration for HMI and mapping design.

In this research package for China, SBD provide a complete solution with combined analysis of the market trends, a feature database and an exclusive photo library.



### The key market drivers for telematics in China

This report provides an analysis of the drivers for in-car telematics services in China. It identifies the important factors that are encouraging manufacturers to offer OE telematics services. Including:

- Car ownership
- Road safety & emergency services
- Vehicle theft
- Cellular network coverage
- Local aftermarket solutions
- Government policy