

Automotive Electronics & Entertainment Systems Service (2018 Edition)

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Service Summary

For the last twenty years the automotive sector has proven to be one of the most stable and consistent growth markets for suppliers of electronics and semiconductors. The rise of electric powertrains, semi- and fully-autonomous vehicles, increasingly complex safety legislation, along with consumers' growing expectations for enhanced comfort, communications and entertainment, will almost certainly dictate a trend for rising electronic and semiconductor content over the next twenty years.

Now at the tenth edition, Semicast's **Automotive Electronics & Entertainment Systems Service** has been developed to aid electronics, semiconductor and software suppliers to obtain a comprehensive overview of on-going trends for the automotive industry. Last published in November 2016, the latest edition of the service will allow suppliers to obtain an up-to-date analysis of the market, to quantify demand for the key automotive electronics and entertainment systems, and to rationalize that demand to forecasts for system volumes, electronics value and semiconductor TAM. 2017 will be used as the base year for analysis in each study, with forecasts provided to 2024.

The key components of the service are as follows:

- Automotive Electronic Controllers study (see page 2).
- Automotive Audio, Infotainment & Navigation Systems study (see pages 3 & 4).
- Automotive Market for Semiconductors study (see page 5).
- Inclusive telephone-based analyst enquiry time to review questions and uncertainties related to automotive market trends and forecasts.

This document provides an overview of the three studies in the service, detailing system coverage, market segmentation, geographic segmentation, semiconductor segmentation, publication timescales, analyst biography and an order form.

For further information on study content and specifications, please contact principal analyst Colin Barnden at colin.barnden@semicast.net

Timescales

- Primary research - August to October
- Publication of complete service - end of November

Service Cost

- **Enterprise License (includes PDF and Excel deliverables) : \$13,500**



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Automotive Electronic Controllers Study Overview

The study will analyze the market in terms of units and revenues for each of the 34 automotive electronic controllers listed below. Factory fitted systems only will be included; aftermarket systems will be excluded from the scope. 2017 will be used as the base year for analysis with forecasts to 2024.

System Coverage

- Smart Airbag
- Electric Power Steering
- Conventional Cruise Control
- Rear Electric Windows
- Air Conditioning
- ABS/TCS
- Rain & Light Sensors
- Automatic Transmission
- Vehicle Tracking
- Blind Spot Monitoring
- Night Vision
- Driver Monitoring Systems
- Passive Airbag
- Steer-by-wire
- Intelligent Cruise Control
- Automated Driving Computer
- Seat Electronics
- Exterior Solid State Lighting
- Electronic Stability Control
- Tire Pressure Warning
- Keyless Entry
- Head Up Display
- Electric Parking Brake
- Electro-hydraulic Steering
- Electronic Suspension
- Front Door Electronics
- Electronic Instrument Clusters
- Smart Junction Boxes
- Other Body Electronics
- Brake-by-wire
- Engine Control & Ignition
- Alarms/Immobilizers
- Passive Park Assist
- Autonomous Park Assist

Regional Analysis

For each system, regional breakdowns in terms of region of vehicle production will be presented as follows:

- North America
- China
- Russia
- Europe
- South Korea
- Brazil
- Japan
- India
- Rest of the World

Market Metrics

Further segmentation will be provided by region, by system type, as follows:

- Installation Rate
- Revenues (\$)
- Units Installed
- Electronics ASP (\$)

Sample Pages

Sample pages from the previous edition of this study, published in November 2016, are available upon request.

Automotive Audio, Infotainment & Navigation Systems Study Overview

The study will analyze the market in terms of units and revenues for each of the systems listed below. Factory fit (OE), aftermarket and dealer-fit systems will all be covered within the scope. 2017 will be used as the base year for analysis with forecasts to 2024.

System Coverage

- Audio-only Source Units
- Embedded Navigation Systems
- Amplifiers
- Front Seat Infotainment
- Embedded Communications Modules
- Rear Seat Entertainment
- Autochangers

Additional System Analysis

For each of the following systems, additional analysis of the market will be presented as follows:

All Source Units:

- with smartphone integration (e.g. Apple CarPlay and Android Auto). Analysis will be presented both for OE and Aftermarket shipments.
- with integrated Bluetooth. Analysis will be presented both for OE and Aftermarket shipments.

Audio-only Source Units:

- by **sales channel**: into OE and Aftermarket.

Front Seat Infotainment:

- by **sales channel**: into OE and Aftermarket.

Rear Seat Entertainment:

- by **sales channel**: into OE and Aftermarket.

Navigation Systems:

- by **media format**: into DVD, SD Card, HDD, Solid State Drive, Off-board. Analysis will be presented both for OE and Aftermarket shipments.
- by **sales channel**: into OE and Aftermarket.

Amplifiers:

- by **sales channel**: into OE and Aftermarket.

Automotive Audio, Infotainment & Navigation Systems Study Overview

Regional Analysis

Further segmentation will be provided by region, by system type, as follows:

- North America
- Europe
- Japan
- China
- South Korea
- India
- Russia
- Brazil
- Rest of the World

Market Metrics

For each system, regional breakdowns in terms of region of equipment sale will be presented as follows:

- Units
- ASP (\$)
- Revenues (\$)

Market Share Analysis

Market shares (units) for 2017 will be presented for North America, Europe, Japan and China as follows:

- Audio-only Source Units (share analysis both for OE and Aftermarket suppliers)
- Front Seat Infotainment (share analysis both for OE and Aftermarket suppliers)
- Rear Seat Entertainment (share analysis both for OE and Aftermarket suppliers)
- Embedded Navigation Systems (share analysis both for OE and Aftermarket suppliers)

Sample Pages

Sample pages from the previous edition of this study, published in November 2016, are available upon request.

Automotive Market for Semiconductors Study Overview

The study will analyze the market for semiconductors in the automotive sector, providing segmentation into 19 product types. 2017 will be used as the base year for analysis with forecasts to 2024. Analysis of supplier market shares for automotive semiconductors in 2016 will also be provided.

Automotive System Breakdown

The study will segment trends for automotive semiconductor demand into each of the following main system areas:

- Body & Chassis
- ADAS
- Aftermarket
- Powertrain
- OE Security
- Safety
- OE Entertainment Systems

Semiconductor Market Breakdown

For each main system area (as listed above), the study will provide analysis of the market for automotive semiconductors into 19 product types, as follows:

- 4/8-bit MCU
- 16-bit MCU
- 32/64-bit MCU/MPU
- DSP
- Gate Arrays & Standard Cells
- PLD/FPGA
- Other Optoelectronics
- Other Logic
- General Purpose Analog
- Application Specific Analog
- IGBTs
- MOSFETs
- LEDs
- Other Discretes & Modules
- Actuators & Sensors
- DRAM/SRAM
- PROM/EPROM/Flash/Other
- Rectifiers
- Image Sensors & MMICs

32/64-bit MCU/MPU Market by Core Type

The automotive market for 32/64-bit MCUs/MPUs will further be segmented in each main system area as follows:

- ARM MCU
- Power Architecture
- SuperH
- Other
- ARM MPU
- 68K/Coldfire
- TriCore
- MIPS
- x86
- V850/RH850

Sample Pages

Sample pages from the previous edition of this study, published in November 2016, are available upon request.

Analyst Biography

Colin Barnden - Principal Analyst



Colin joined Semicast Research in 2006 and is principal analyst for semiconductor research and vice president of business development. Prior to joining Semicast, he worked for 12 years at IMS Research, rising to the position of Senior Research Director of its Semiconductor Research Group and responsible for analyst coverage on the analog/mixed signal, optoelectronic and embedded processing industries. Colin also set-up and established IMS Research's Automotive Electronics Group. During his tenure, Colin authored dozens of reports and became a well respected industry analyst. He holds a B.S. in Electronic Engineering from Aston University, England and has more than twenty years of experience as an industry analyst.

About Semicast Research

Founded in 2006, Semicast has an established reputation at most top 20 semiconductor suppliers, with areas of expertise covering industrial and medical electronics and semiconductors; industrial IoT; automotive electronic controllers; automotive audio, infotainment & navigation systems; automotive semiconductors; and 32-bit microcontrollers.

With more than twenty years of market research experience, our analysts use a combination of technical expertise, a proven method for producing electronics focused market research and specific applications knowledge to produce concise and timely research to help you make effective business decisions.

Semicast is a privately-held company and is not tied to any PR, media or financial organizations. This gives vital impartiality in making independent market forecasts, free of alternative agenda or bias.

Order Form



Scan & e-mail to : info@semicast.net | Fax to : +1 (408) 351-9400

Automotive Electronics & Entertainment Systems Service — 2018 Edition

License Type	Deliverables	Price
Enterprise	PDF + Excel by e-mail	\$13,500

Notes:

- Analyst support time is included to answer all reasonable questions relating to forecasts and conclusions.
- PDF files are printable.
- Enterprise license permits storage of the research on the purchasing company's intranet for access by permanent company employees.
- VAT number must be quoted for orders from the EU. VAT will be added to orders from the UK.

Name : _____

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METHOD OF PAYMENT

Purchase Order: Semicast will supply a formal quotation on receipt of this order form and an invoice will be issued on receipt of the purchase order. Standard invoice payment terms are net 30 days. The reports will each be e-mailed on publication.

Credit Card: American Express, MasterCard and Visa are accepted. You will receive a Payment Request by e-mail. Click "Pay Now" to enter your card details and make secure payment through our payment services provider (Worldpay). Your card details will not be transferred to Semicast. The reports will each be e-mailed on publication.