

Market Analysis & Forecasts



CONTENTS

Abstract

Key Point Conclusions

Overview

System Coverage

Sample Table

Table of Contents

Analyst Bio, About
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Automotive Entertainment Systems—2009 Edition

Analysis of global and regional market trends for automotive entertainment systems | Published September 2009 | 204 Pages

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Abstract

Semicast's Automotive Electronics & Entertainment Systems Service has been developed to aid suppliers to obtain a comprehensive overview of both short term and long term trends for the automotive industry. The complete service allows suppliers to obtain analysis of the market, to quantify demand for the key automotive electronics and entertainment systems, and to rationalize that demand to long term forecasts for system volumes, electronics value and semiconductor TAM.

This study is dedicated to analysis of the global market for automotive entertainment systems, including audio-only systems, front seat infotainment, rear seat entertainment, embedded navigation systems and embedded telematics. For further information on the market for automotive "under-the-hood" systems, such as body, chassis, powertrain, safety and security, please refer to the Semicast report "Under-the-hood Automotive Electronic Systems".

Additions to Scope for 2009 Edition

- Geographic analysis expanded to provide coverage of nine regions: North America, Europe, Japan, China, South Korea, India, Russia, Brazil and Rest of the World.
- Analysis of the market for SD Card embedded navigation systems.
- Analysis of the market for "Drive-free" (no CD/DVD/HDD) audio-only systems.

Key Point Conclusions

- Global light vehicle production is forecast to decline to 54 million in 2009, from 66 million in 2008. Production is forecast to increase to 61 million in 2010, and to grow steadily to 85 million in 2017. Europe is forecast to remain the largest light vehicle production region over the period to 2017.
- Revenues for automotive entertainment systems are forecast to decline by 22% in 2009, but to grow steadily over the period 2010 to 2017.
- Highest revenue growth is forecast for embedded navigation systems and embedded telematics. Revenues for audio-only systems are forecast to decline steadily over the long term.
- North America had the highest revenues for automotive entertainment systems in 2008, followed by Europe. Europe is forecast to overtake North America as the largest region in 2009 and to continue to have the highest revenues over the period to 2017.
- Continental was the leading supplier of OE automotive entertainment systems in 2008.

Automotive Entertainment Systems— Overview

Key features of the study include:

- Coverage of audio-only systems, front seat infotainment, rear seat entertainment, embedded navigation systems and embedded telematics. Coverage also of autochangers, satellite radio tuners and amplifiers.
- Analysis of market trends for each system in nine geographic regions: North America, Europe, Japan, China, South Korea, India, Russia, Brazil and Rest of the World.
- Analysis of unit shipments, average pricing and revenues for each system, in each region. Base year is 2008, with forecasts to 2017.
- Supplier market share estimates in 2008 for audio-only systems, front seat infotainment, rear seat entertainment and embedded navigation systems. Separate analysis provided for OE and aftermarket shipments.
- Analysis of automotive source unit connectivity, covering OE and aftermarket trends for integrated Bluetooth, aux in and multimedia interface (USB, SD Card, Firewire etc).
- Analysis of media format trends, covering CD, DVD, HDD storage and solid state mass storage.
- Highly quantitative analysis, with discussion summarized in short, easy to read bullet points.
- PDF and Excel delivery options available.

System Coverage

The report analyzes the market in units and revenues for eight automotive entertainment systems. Factory fit (OE) systems, dealer-fit and aftermarket systems are all included. 2008 is used as the base year with forecasts to 2017.

- | | | |
|-------------------------------|---------------------------|-------------------------------------|
| • Audio-only Systems | • Front Seat Infotainment | • Rear Seat Entertainment |
| • Embedded Navigation Systems | • Embedded Telematics | • Standalone Satellite Radio Tuners |
| • Amplifiers | • Autochangers | |

Additional System Analysis

Additional analysis of the market is presented as follows:

Audio-only Systems:

- by **media format**: into Cassette/MiniDisc, CD (Uncompressed), CD (MP3/WMA compatible), High Definition Audio, Hard Disc Storage, Solid State Mass Storage (>10GB), Drive-free (No CD/DVD/HDD). Separate analysis is presented for OE and aftermarket shipments.

- 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.

Embedded Navigation Systems:

- by **system type:** into basic, dynamic and network-linked.

- by **media format:** into CD, SD Card, DVD, HDD and Solid State Mass Storage (>40GB). Separate analysis is presented for OE and aftermarket shipments.

- by **navigation type:** into full color map and turn-by-turn.

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

Autochangers:

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

Standalone Satellite Radio Tuners:

- by **type:** into integrated vs. standalone.

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

Amplifiers:

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

All Source Units:

- by **connectivity type:** into integrated Bluetooth, aux in and multimedia interface. Separate analysis is presented for OE and aftermarket shipments.

Regional Analysis

For each system, regional breakdowns are presented as follows:

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

Market Metrics

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

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

Market Share Analysis

Market shares (in units) are provided for 2008 for North America, Europe, Japan and China as follows:

- Audio-only Systems
- Front Seat Infotainment
- Rear Seat Entertainment
- Embedded Navigation Systems

Separate analysis is presented for OE and aftermarket shipments in each case.

Sample Table

A sample table taken from the report showing the format used to present the market forecasts is shown below.

Regional Shipments of OE Embedded Navigation Systems by Media Format

Region (000s)	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	CAGR (08/17)	DIFF (08-17)	SUM (08>17)
North America											0.0%	0	0
CD											-	0	0
SD Card											-	0	0
DVD											-	0	0
Hard Disc Storage											-	0	0
Solid State Mass Storage (>40GB)											-	0	0
Europe											0.0%	0	0
CD											-	0	0
SD Card											-	0	0
DVD											-	0	0
Hard Disc Storage											-	0	0
Solid State Mass Storage (>40GB)											-	0	0
Japan											0.0%	0	0
CD											-	0	0
SD Card											-	0	0
DVD											-	0	0
Hard Disc Storage											-	0	0
Solid State Mass Storage (>40GB)											-	0	0
China											0.0%	0	0
CD											-	0	0
SD Card											-	0	0
DVD											-	0	0
Hard Disc Storage											-	0	0
Solid State Mass Storage (>40GB)											-	0	0
South Korea											0.0%	0	0
CD											-	0	0
SD Card											-	0	0
DVD											-	0	0
Hard Disc Storage											-	0	0
Solid State Mass Storage (>40GB)											-	0	0
India											0.0%	0	0
CD											-	0	0
SD Card											-	0	0
DVD											-	0	0
Hard Disc Storage											-	0	0
Solid State Mass Storage (>40GB)											-	0	0
Russia											0.0%	0	0
CD											-	0	0
SD Card											-	0	0
DVD											-	0	0
Hard Disc Storage											-	0	0
Solid State Mass Storage (>40GB)											-	0	0
Brazil											0.0%	0	0
CD											-	0	0
SD Card											-	0	0
DVD											-	0	0
Hard Disc Storage											-	0	0
Solid State Mass Storage (>40GB)											-	0	0
Rest of the World											0.0%	0	0
CD											-	0	0
SD Card											-	0	0
DVD											-	0	0
Hard Disc Storage											-	0	0
Solid State Mass Storage (>40GB)											-	0	0
CD	0	0	0	0	0	0	0	0	0	0	0.0%	0	0
% of total													
SD Card	0	0	0	0	0	0	0	0	0	0	0.0%	0	0
% of total													
DVD	0	0	0	0	0	0	0	0	0	0	0.0%	0	0
% of total													
Hard Disc Storage	0	0	0	0	0	0	0	0	0	0	0.0%	0	0
% of total													
Solid State Mass Storage (>40GB)	0	0	0	0	0	0	0	0	0	0	0.0%	0	0
% of total													
Total	-	-	-	-	-	-	-	-	-	-	0.0%	0	0
Annual Growth Rate													

Source: Semicast Research

Table of Contents

Section 1 –

Executive Overview

Key Point Conclusions

Section 2 – Scope & Method

2.1 Scope, Content & Definitions

2.2 Research Method

2.3 Automotive Electronics & Entertainment Systems Service

Section 3 – Global & Regional

Light Vehicle Sales Forecast

Section 4 – Automotive

Entertainment Systems by

System Type

4.1 World Market for

Automotive Entertainment

Systems – Unit Summary by

System

4.2 World Market for

Automotive Entertainment

Systems – Revenue Summary by

System

4.3 Audio-only Source Units

4.4 Audio-only Source Units by

Media Format

4.4.1 OE Audio-only Source

Units by Media Format

4.4.2 Aftermarket Audio-only

Source Units by Media Format

4.5 Audio-only Source Units by

Sales Channel

4.6 Front Seat Infotainment

4.7 Front Seat Infotainment by

Sales Channel

4.8 Rear Seat Entertainment

4.9 Rear Seat Entertainment by

Sales Channel

4.10 Embedded Navigation

Systems

4.11 Embedded Navigation

Systems by System Type

4.12 Embedded Navigation

Systems by Media Type

4.12.1 OE Embedded Naviga-

tion Systems by Media Type

4.12.2 Aftermarket Embedded

Navigation Systems by Media

Type

4.13 Embedded Navigation

Systems by Navigation Type

4.14 Embedded Navigation

Systems by Sales Channel

4.15 Embedded Telematics

Systems

4.16 Autochangers

4.17 Autochangers by Sales

Channel

4.18 Standalone Satellite Radio

Tuners

4.19 Trends for Integrated vs.

Standalone Satellite Radio

Tuners

4.20 Standalone Satellite Radio

Tuners by Sales Channel

4.21 Amplifiers

4.22 Amplifiers by Sales Channel

Section 5 – Automotive

Source Unit Connectivity

Trends

Section 6 – Automotive

Entertainment Systems by

Region

Section 7 – Automotive

Entertainment Systems 2008

Supplier Market Share

Estimates

Appendix I – Automotive

Entertainment System

Suppliers

List of Tables (218 tables)

Table 1.1 Automotive Entertainment

Systems Revenue Summary by System

Table 1.2 Automotive Entertainment

Systems Unit Summary by System

Table 1.3 Regional Shipments of Auto-

motive Source Units by Media Format

Table 1.4 Automotive Entertainment

Systems Revenue & Unit Summary by

Region

Table 1.5 Worldwide 2008 Market Share

Estimates for OE & Aftermarket

Automotive Source Units

Table 2.1 Regional Definitions

Table 2.2 Product Definitions &

Description

Table 3.1 Global Light Vehicle Sales

Forecast by Region

Table 4.1 Automotive Entertainment

Systems Unit Summary by System

Table 4.2 Automotive Entertainment

Systems Revenue Summary by System

Table 4.3 World Market for Audio-only

Source Units by Region

Table 4.4 Regional Shipments of Audio-

only Source Units by Media Format

in Mature Markets

Table 4.5 Regional Shipments of Audio-

only Source Units by Media Format

in Developing Markets

Table 4.6 Regional Shipments of OE

Audio-only Source Units by Media

Format in Mature Markets

Table 4.7 Regional Shipments of OE

Audio-only Source Units by Media

Format in Developing Markets

Table 4.8 Regional Shipments of

Aftermarket Audio-only Source Units by

Media Format in Mature Markets

Table 4.9 Regional Shipments of

Aftermarket Audio-only Source Units by

Media Format in Developing Markets

Table 4.10 Regional Shipments of Audio-

only Source Units by Sales Channel

Table 4.11 World Market for Front Seat

Infotainment Systems by Region

Table 4.12 Regional Shipments of Front

Seat Infotainment Systems by

Sales Channel

Table 4.13 World Market for Rear Seat

Entertainment Systems by Region

Table 4.14 Regional Shipments of Rear

Seat Entertainment Systems by Sales

Channel

Table 4.15 World Market for Embedded

Navigation Systems by Region

Table 4.16 Regional Shipments of

Embedded Navigation Systems by

System Type

Table 4.17 Regional Shipments of

Embedded Navigation Systems by Media

Format

Table 4.18 Regional Shipments of OE

Embedded Navigation Systems by Media

Format

Table 4.19 Regional Shipments of

Aftermarket Embedded Navigation

Systems by Media Format

Table 4.20 Regional Shipments of Em-

bedded Navigation Systems by

Navigation Type

Table 4.21 Regional Shipments of

Embedded Navigation Systems by Sales

Channel

Table 4.22 World Market for Embedded

Telematics Systems by Region

Table 4.23 World Market for

Autochangers by Region

Table 4.24 Regional Shipments of

Autochangers by Sales Channel

Table 4.25 World Market for Standalone

Satellite Radio Tuners by Region

Table 4.26 Regional Shipments of

Integrated vs Standalone Satellite Radio

Tuners

Table 4.27 Regional Shipments of

Standalone Satellite Radio Tuners

by Sales Channel

Table 4.28 World Market for Amplifiers

by Region

Table 4.29 Regional Shipments of

Amplifiers by Sales Channel

Table 5.1 Regional Shipments of

Automotive Source Units with Integrated

Bluetooth

Table 5.2 Regional Shipments of OE

Automotive Source Units with Integrated

Bluetooth

Table 5.3 Regional Shipments of After-

market Automotive Source Units with

Integrated Bluetooth

Table 5.4 Regional Shipments of

Automotive Source Units with Aux In

Table 5.5 Regional Shipments of OE

Automotive Source Units with Aux In

Table 5.6 Regional Shipments of After-

market Automotive Source Units with

Aux In

Table 5.7 Regional Shipments of Auto-

motive Source Units with Multimedia

Interface

Table 5.8 Regional Shipments of OE

Automotive Source Units

with Multimedia Interface

Table 5.9 Regional Shipments of After-

market Automotive Source Units

with Multimedia Interface

Table 5.10 Regional Shipments of Auto-

motive Source Units by Media Format-

Table 6.1 Automotive Entertainment

Systems Revenue & Unit Summary by

Region

Table 6.2 North American Automotive

Entertainment Systems Unit Summary

by System

Table 6.3 North American Automotive

Entertainment Systems Revenue Sum-

mary by System

Table 6.4 North American Shipments of

OE & Aftermarket Audio-only Source

Units by Media Format

Table 6.5 North American Shipments of

Front Seat Infotainment Systems by

Sales Channel

Table 6.6 North American Shipments of

Rear Seat Entertainment Systems by

Sales Channel

Table 6.7 North American Shipments of

Embedded Navigation Systems by

System Type

Table 6.8 North American Shipments of

OE & Aftermarket Embedded Naviga-

tion Systems by Media Format

Table 6.9 North American Shipments of

Embedded Navigation Systems by

Navigation Type

Table 6.10 North American Shipments

of Autochangers by Sales Channel

Table 6.11 North American Shipments

of Integrated vs Standalone Satellite

Radio Tuners

Table 6.12 North American Shipments

of Standalone Satellite Radio Tuners

by Sales Channel

Table 6.13 North American Shipments

of Amplifiers by Sales Channel

Table 6.14 North American Shipments

of OE & Aftermarket Automotive

Source Units with Integrated Bluetooth

Table 6.15 North American Shipments

of OE & Aftermarket Automotive

Source Units with Aux In

Table 6.16 North American Shipments

of OE & Aftermarket Automotive

Source Units with Multimedia Interface

Table 6.17 North American Shipments

of Automotive Source Units by Media

Format

Table 6.18 European Automotive

Entertainment Systems Unit Summary

by System

Table 6.19 European Automotive

Entertainment Systems Revenue Sum-

mary by System

Table 6.20 European Shipments of OE

& Aftermarket Audio-only Source Units

by Media Format

Table 6.21 European Shipments of Front

Seat Infotainment Systems by Sales

Channel	Aftermarket Automotive Source Units with Integrated Bluetooth	Rear Seat Entertainment Systems by Sales Channel	Table 6.95 Indian Shipments of OE & Aftermarket Automotive Source Units with Aux In
Table 6.22 European Shipments of Rear Seat Entertainment Systems by Sales Channel	Table 6.47 Japanese Shipments of OE & Aftermarket Automotive Source Units with Aux In	Table 6.71 South Korean Shipments of Embedded Navigation Systems by System Type	Table 6.96 Indian Shipments of OE & Aftermarket Automotive Source Units with Multimedia Interface
Table 6.23 European Shipments of Embedded Navigation Systems by System Type	Table 6.48 Japanese Shipments of OE & Aftermarket Automotive Source Units with Multimedia Interface	Table 6.72 South Korean Shipments of OE & Aftermarket Embedded Navigation Systems by Media Format	Table 6.97 Indian Shipments of Automotive Source Units by Media Format
Table 6.24 European Shipments of OE & Aftermarket Embedded Navigation Systems by Media Format	Table 6.49 Japanese Shipments of Automotive Source Units by Media Format	Table 6.73 South Korean Shipments of Embedded Navigation Systems by Navigation Type	Table 6.98 Russian Automotive Entertainment Systems Unit Summary by System
Table 6.25 European Shipments of Embedded Navigation Systems by Navigation Type	Table 6.50 Chinese Automotive Entertainment Systems Unit Summary by System	Table 6.74 South Korean Shipments of Autochangers by Sales Channel	Table 6.99 Russian Automotive Entertainment Systems Revenue Summary by System
Table 6.26 European Shipments of Autochangers by Sales Channel	Table 6.51 Chinese Automotive Entertainment Systems Revenue Summary by System	Table 6.75 South Korean Shipments of Integrated vs Standalone Satellite Radio Tuners	Table 6.100 Russian Shipments of OE & Aftermarket Audio-only Source Units by Media Format
Table 6.27 European Shipments of Integrated vs Standalone Satellite Radio Tuners	Table 6.52 Chinese Shipments of OE & Aftermarket Audio-only Source Units by Media Format	Table 6.76 South Korean World Shipments of Standalone Satellite Radio Tuners by Sales Channel	Table 6.101 Russian Shipments of Front Seat Infotainment Systems by Sales Channel
Table 6.28 European Shipments of Standalone Satellite Radio Tuners by Sales Channel	Table 6.53 Chinese Shipments of Front Seat Infotainment Systems by Sales Channel	Table 6.77 South Korean Shipments of Amplifiers by Sales Channel	Table 6.102 Russian Shipments of Rear Seat Entertainment Systems by Sales Channel
Table 6.29 European Shipments of Amplifiers by Sales Channel	Table 6.54 Chinese Shipments of Rear Seat Entertainment Systems by Sales Channel	Table 6.78 South Korean Shipments of OE & Aftermarket Automotive Source Units with Integrated Bluetooth	Table 6.103 Russian Shipments of Embedded Navigation Systems by System Type
Table 6.30 European Shipments of OE & Aftermarket Automotive Source Units with Integrated Bluetooth	Table 6.55 Chinese Shipments of Embedded Navigation Systems by System Type	Table 6.79 South Korean Shipments of OE & Aftermarket Automotive Source Units with Aux In	Table 6.104 Russian Shipments of OE & Aftermarket Embedded Navigation Systems by Media Format
Table 6.31 European Shipments of OE & Aftermarket Automotive Source Units with Aux In	Table 6.56 Chinese Shipments of OE & Aftermarket Embedded Navigation Systems by Media Format	Table 6.80 South Korean Shipments of OE & Aftermarket Automotive Source Units with Multimedia Interface	Table 6.105 Russian Shipments of Embedded Navigation Systems by Navigation Type
Table 6.32 European Shipments of OE & Aftermarket Automotive Source Units with Multimedia Interface	Table 6.57 Chinese Shipments of Embedded Navigation Systems by Navigation Type	Table 6.81 South Korean Shipments of Automotive Source Units by Media Format	Table 6.106 Russian Shipments of Autochangers by Sales Channel
Table 6.33 European Shipments of Automotive Source Units by Media Format	Table 6.58 Chinese Shipments of Autochangers by Sales Channel	Table 6.82 Indian Automotive Entertainment Systems Unit Summary by System	Table 6.107 Russian Shipments of Integrated vs Standalone Satellite Radio Tuners
Table 6.34 Japanese Automotive Entertainment Systems Unit Summary by System	Table 6.59 Chinese Shipments of Integrated vs Standalone Satellite Radio Tuners	Table 6.83 Indian Automotive Entertainment Systems Revenue Summary by System	Table 6.108 Russian Shipments of Standalone Satellite Radio Tuners by Sales Channel
Table 6.35 Japanese Automotive Entertainment Systems Revenue Summary by System	Table 6.60 Chinese Shipments of Standalone Satellite Radio Tuners by Sales Channel	Table 6.84 Indian Shipments of OE & Aftermarket Audio-only Source Units by Media Format	Table 6.109 Russian Shipments of Amplifiers by Sales Channel
Table 6.36 Japanese Shipments of OE & Aftermarket Audio-only Source Units by Media Format	Table 6.61 Chinese Shipments of Amplifiers by Sales Channel	Table 6.85 Indian Shipments of Front Seat Infotainment Systems by Sales Channel	Table 6.110 Russian Shipments of OE & Aftermarket Automotive Source Units with Integrated Bluetooth
Table 6.37 Japanese Shipments of Front Seat Infotainment Systems by Sales Channel	Table 6.62 Chinese Shipments of OE & Aftermarket Automotive Source Units with Integrated Bluetooth	Table 6.86 Indian Shipments of Rear Seat Entertainment Systems by Sales Channel	Table 6.111 Russian Shipments of OE & Aftermarket Automotive Source Units with Aux In
Table 6.38 Japanese Shipments of Rear Seat Entertainment Systems by Sales Channel	Table 6.63 Chinese Shipments of OE & Aftermarket Automotive Source Units with Aux In	Table 6.87 Indian Shipments of Embedded Navigation Systems by System Type	Table 6.112 Russian Shipments of OE & Aftermarket Automotive Source Units with Multimedia Interface
Table 6.39 Japanese Shipments of Embedded Navigation Systems by System Type	Table 6.64 Chinese Shipments of OE & Aftermarket Automotive Source Units with Multimedia Interface	Table 6.88 Indian Shipments of OE & Aftermarket Embedded Navigation Systems by Media Format	Table 6.113 Russian Shipments of Automotive Source Units by Media Format
Table 6.40 Japanese Shipments of OE & Aftermarket Embedded Navigation Systems by Media Format	Table 6.65 Chinese Shipments of Automotive Source Units by Media Format	Table 6.89 Indian Shipments of Embedded Navigation Systems by Navigation Type	Table 6.114 Brazilian Automotive Entertainment Systems Unit Summary by System
Table 6.41 Japanese Shipments of Embedded Navigation Systems by Navigation Type	Table 6.66 South Korean Automotive Entertainment Systems Unit Summary by System	Table 6.90 Indian Shipments of Autochangers by Sales Channel	Table 6.115 Brazilian Automotive Entertainment Systems Revenue Summary by System
Table 6.42 Japanese Shipments of Autochangers by Sales Channel	Table 6.67 South Korean Automotive Entertainment Systems Revenue Summary by System	Table 6.91 Indian Shipments of Integrated vs Standalone Satellite Radio Tuners	Table 6.116 Brazilian Shipments of OE & Aftermarket Audio-only Source Units by Media Format
Table 6.43 Japanese Shipments of Integrated vs Standalone Satellite Radio Tuners	Table 6.68 South Korean Shipments of OE & Aftermarket Audio-only Source Units by Media Format	Table 6.92 Indian Shipments of Standalone Satellite Radio Tuners by Sales Channel	Table 6.117 Brazilian Shipments of Front Seat Infotainment Systems by Sales Channel
Table 6.44 Japanese Shipments of Standalone Satellite Radio Tuners by Sales Channel	Table 6.69 South Korean Shipments of Front Seat Infotainment Systems by Sales Channel	Table 6.93 Indian Shipments of Amplifiers by Sales Channel	Table 6.118 Brazilian Shipments of Rear Seat Entertainment Systems by Sales Channel
Table 6.45 Japanese Shipments of Amplifiers by Sales Channel	Table 6.70 South Korean Shipments of	Table 6.94 Indian Shipments of OE & Aftermarket Automotive Source Units with Integrated Bluetooth	

Table 6.119 Brazilian Shipments of Embedded Navigation Systems by System Type
Table 6.120 Brazilian Shipments of OE & Aftermarket Embedded Navigation Systems by Media Format
Table 6.121 Brazilian Shipments of Embedded Navigation Systems by Navigation Type
Table 6.122 Brazilian Shipments of Autochangers by Sales Channel
Table 6.123 Brazilian Shipments of Integrated vs Standalone Satellite Radio Tuners
Table 6.124 Brazilian Shipments of Standalone Satellite Radio Tuners by Sales Channel
Table 6.125 Brazilian Shipments of Amplifiers by Sales Channel
Table 6.126 Brazilian Shipments of OE & Aftermarket Automotive Source Units with Integrated Bluetooth
Table 6.127 Brazilian Shipments of OE & Aftermarket Automotive Source Units with Aux In
Table 6.128 Brazilian Shipments of OE & Aftermarket Automotive Source Units with Multimedia Interface
Table 6.129 Brazilian Shipments of Automotive Source Units by Media Format
Table 6.130 Rest of the World Automotive Entertainment Systems Unit Summary by System
Table 6.131 Rest of the World Automotive Entertainment Systems Revenue Summary by System
Table 6.132 Rest of the World Shipments of OE & Aftermarket Audio-only Source Units by Media Format
Table 6.133 Rest of the World Shipments of Front Seat Infotainment Systems by Sales Channel
Table 6.134 Rest of the World Shipments of Rear Seat Entertainment Systems by Sales Channel
Table 6.135 Rest of the World Shipments of Embedded Navigation Systems by System Type
Table 6.136 Rest of the World Shipments of OE & Aftermarket Embedded Navigation Systems by Media Format
Table 6.137 Rest of the World Shipments of Embedded Navigation Systems by Navigation Type
Table 6.138 Rest of the World Shipments of Autochangers by Sales Channel
Table 6.139 Rest of the World Shipments of Integrated vs Standalone Satellite Radio Tuners
Table 6.140 Rest of the World Shipments of Standalone Satellite Radio Tuners by Sales Channel
Table 6.141 Rest of the World Shipments of Amplifiers by Sales Channel
Table 6.142 Rest of the World Shipments of OE & Aftermarket Automotive Source Units with Integrated Bluetooth
Table 6.143 Rest of the World Shipments of OE & Aftermarket Automotive

Source Units with Aux In
Table 6.144 Rest of the World Shipments of OE & Aftermarket Automotive Source Units with Multimedia Interface
Table 6.145 Rest of the World Shipments of Automotive Source Units by Media Format
Table 7.1 Worldwide 2008 Market Share Estimates for OE & Aftermarket Automotive Source Units
Table 7.2 Worldwide 2008 Market Share Estimates for OE & Aftermarket Audio-only Source Units
Table 7.3 Worldwide 2008 Market Share Estimates for OE & Aftermarket Front Seat Infotainment Systems
Table 7.4 Worldwide 2008 Market Share Estimates for OE & Aftermarket Rear Seat Entertainment Systems
Table 7.5 Worldwide 2008 Market Share Estimates for OE & Aftermarket Embedded Navigation Systems
Table 7.6 North American 2008 Market Share Estimates for OE & Aftermarket Automotive Source Units
Table 7.7 North American 2008 Market Share Estimates for OE & Aftermarket Audio-only Source Units
Table 7.8 North American 2008 Market Share Estimates for OE & Aftermarket Front Seat Infotainment Systems
Table 7.9 North American 2008 Market Share Estimates for OE & Aftermarket Rear Seat Entertainment Systems
Table 7.10 North American 2008 Market Share Estimates for OE & Aftermarket Embedded Navigation Systems
Table 7.11 European 2008 Market Share Estimates for OE & Aftermarket Automotive Source Units
Table 7.12 European 2008 Market Share Estimates for OE & Aftermarket Audio-only Source Units
Table 7.13 European 2008 Market Share Estimates for OE & Aftermarket Front Seat Infotainment Systems
Table 7.14 European 2008 Market Share Estimates for OE & Aftermarket Rear Seat Entertainment Systems
Table 7.15 European 2008 Market Share Estimates for OE & Aftermarket Embedded Navigation Systems
Table 7.16 Japanese 2008 Market Share Estimates for OE & Aftermarket Automotive Source Units
Table 7.17 Japanese 2008 Market Share Estimates for OE & Aftermarket Audio-only Source Units
Table 7.18 Japanese 2008 Market Share Estimates for OE & Aftermarket Front Seat Infotainment Systems
Table 7.19 Japanese 2008 Market Share Estimates for OE & Aftermarket Rear Seat Entertainment Systems
Table 7.20 Japanese 2008 Market Share Estimates for OE & Aftermarket Embedded Navigation Systems
Table 7.21 Chinese 2008 Market Share Estimates for OE & Aftermarket Automotive Source Units

Table 7.22 Chinese 2008 Market Share Estimates for OE & Aftermarket Audio-only Source Units
Table 7.23 Chinese 2008 Market Share Estimates for OE & Aftermarket Front Seat Infotainment Systems
Table 7.24 Chinese 2008 Market Share Estimates for OE & Aftermarket Rear Seat Entertainment Systems
Table 7.25 Chinese 2008 Market Share Estimates for OE & Aftermarket Embedded Navigation Systems
Table AP.1 List of Automotive Entertainment System Suppliers

List of Figures (21 figures)

Figure 1 - Global Light Vehicle Sales by Region
Figure 2 - Automotive Source Units - Unit Summary by Type
Figure 3 - Automotive Source Units - Revenue Summary by Type
Figure 4 - Audio-only Source Unit Shipments by Media Format
Figure 5 - Embedded Navigation Systems Shipments by System Type
Figure 6 - Embedded Navigation Systems Shipments by Media Type
Figure 7 - Embedded Navigation Systems Shipments by Navigation Type
Figure 8 - Regional Shipments of Automotive Source Units with Integrated Bluetooth
Figure 9 - Regional Shipments of Automotive Source Units with Aux In
Figure 10 - Regional Shipments of Automotive Source Units with Multimedia Interface
Figure 11 - Automotive Source Unit Shipments by Media Format
Figure 12 - Automotive Entertainment Systems - Revenue Summary by Region
Figure 13 - Automotive Source Units - North American Revenue Summary by Type
Figure 14 - Automotive Source Units - European Revenue Summary by Type
Figure 15 - Automotive Source Units - Japanese Revenue Summary by Type
Figure 16 - Automotive Source Units - Chinese Revenue Summary by Type
Figure 17 - Automotive Source Units - South Korean Revenue Summary by Type
Figure 18 - Automotive Source Units - Indian Revenue Summary by Type
Figure 19 - Automotive Source Units - Russian Revenue Summary by Type
Figure 20 - Automotive Source Units - Brazilian Revenue Summary by Type
Figure 21 - Automotive Source Units - Rest of the World Revenue Summary by Type

Analyst Biography

Colin Barnden - Principal Analyst



Colin joined Semicast Research in June 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 covered the automotive market since 1999.

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