



**Global and China Telematics Box (T-Box)
Industry Report, 2017-2022**

Nov. 2017

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

T-box is a connected-car-standard terminal that meets stringent car-grade requirements on reliability, working temperature and anti-interference and delivers multiple online applications including vehicle remote monitoring, remote control, safety monitoring & warning and remote diagnosis via 4G remote wireless communication, GPS satellite positioning, acceleration sensing and CAN communication.

Connected car hardware is in general installed in the OEM market (dominated by TCU technology) and the aftermarket (mostly via OBD port + derivative device). For now, despite high penetration of OBD system, the proprietary protocol of carmakers is hard to be cracked, limiting the capability of aftermarket OBD devices to acquire data.

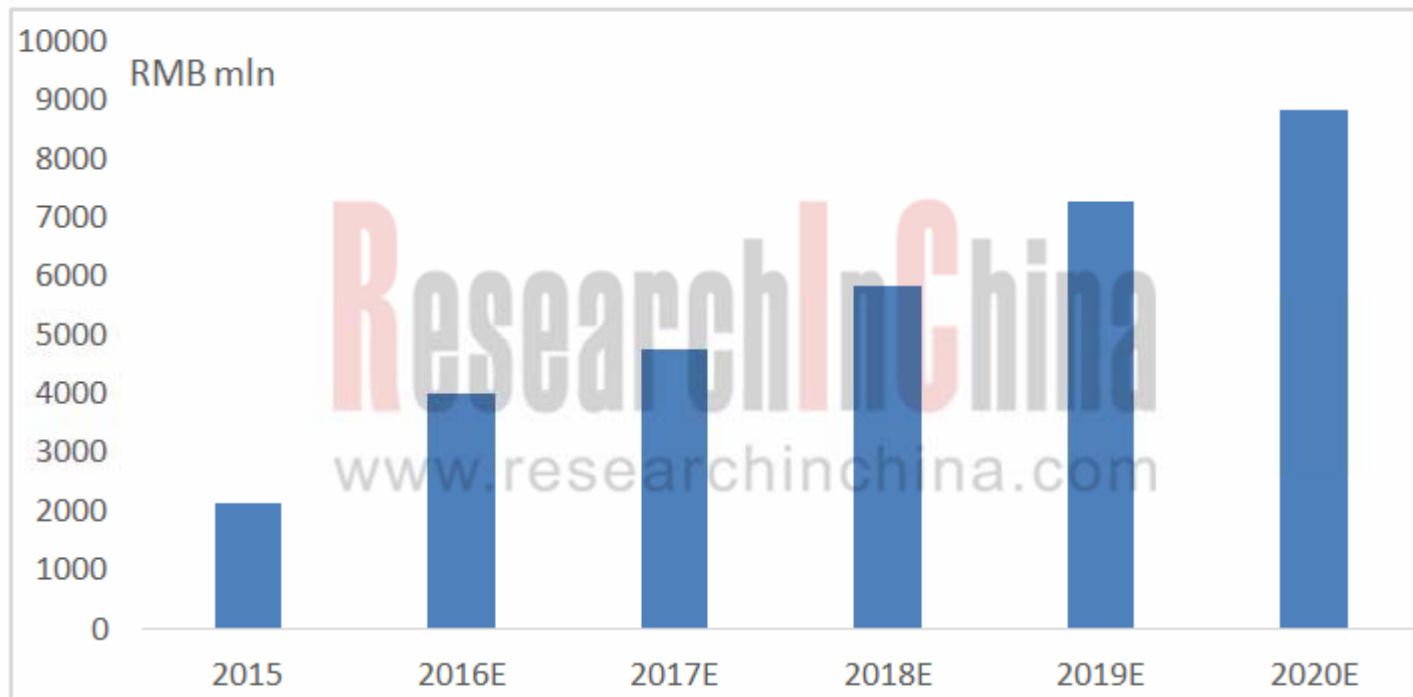
As connected car gradually penetrates and new energy vehicle manufacturers have to know real-time state of battery and the vehicle, global T-box market size will reach USD3.8 billion in 2020, representing a CAGR of roughly 27%. The entry of the internet giants will drive the growth of such market as well.

Global IC market size was about USD309.4 billion in 2016, 7.4% of which was constituted by automotive IC market. The world's automotive IC market ballooned by 22.4% to USD28 billion in 2017, largely due to reduced cost and price of automotive IC, particularly MCU, analog components and special purpose logic.

Among automotive electronic systems, in-vehicle electronics sees a rising share year after year, squeezing the portion of power-control electronic systems. Automotive electronic systems make up no more than 30% of the cost of a conventional car, compared with over 50% for a new energy vehicle and even above 60% for a battery electric vehicle. According to overall planning, new energy vehicle sales in China will show an AAGR of 46% between 2016 and 2020, a strong driver for the development of Chinese automotive electronics market which will register around RMB872 billion in 2020.

According to the Regulations on Access of New Energy Vehicle Manufacturers and Products issued by the Ministry of Industry and Information Technology (MIIT), all new energy vehicles produced from Jan 1, 2017 on must carry vehicle control unit, greatly boosting pre-installation of T-BOX on new energy vehicles. New energy vehicles and mid- and high-end cars will first stimulate OEM T-BOX market. Currently, the terminal of connected car embedded platform system costs about RMB950 per unit. As more OEM terminals are mass-produced and market competition pricks up, the cost and price of T-BOX are anticipated to decline. The penetration of OEM connected-car devices was 15% or so in 2016 and is expected to reach 36% in 2020 when T-BOX terminal market size will be RMB8.8 billion.

Chinese T-BOX Market Size, 2015-2020E



Source: Shujubang

Major Chinese T-box firms are Huawei Technologies, Flaircomm Microelectronics and Shenzhen Thread Tech which face rivalry mainly from foreign players including Bosch, Continental, Harman, Denso and LG. Homegrown brand carmakers, like Chang'an Automobile and Trumpchi, seek to co-develop T-box products with automotive electronics companies with the aim of rapidly gaining market competitiveness and a good position at the least cost.

Global and China Telematics Box (T-box) Industry Report, 2017-2022 highlights the followings:

- ◆ Global and Chinese T-box market size, share and development trends, and future technical routes for T-box;
- ◆ Comparative analysis of T-box makers and applications in countries/regions worldwide;
- ◆ Global T-box companies and comparison of applications;
- ◆ Upstream industry chain of T-box: automotive IC and automotive sensor markets;
- ◆ Development of automotive electronics market in China;
- ◆ T-box market environment, policy climate, etc. in China;
- ◆ Six major foreign T-box brands and four T-box-related manufacturers (technical solutions, T-box business, etc.);
- ◆ 12 Chinese T-box manufacturers (operation, technology, development planning) as well as their support for vehicle models.

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