Automotive Telematics Market: Asia Pacific Industry Analysis and Opportunity Assessment 2014 - 2020

Description: Preview Analysis

Automotive Telematics Market Overview:

Automotive telematics combines telecommunication and informatics to provide various services such as navigation, safety and security dynamically to vehicles. Currently, the global penetration of automotive telematics is currently ~48%, which is expected to reach ~62% by 2020.

Asia Pacific automotive telematics market is expected to reach US$ 15,248 Million by 2020 at an estimated CAGR of 11.6% during forecast period. Increased vehicle production and sales, regulatory reforms and improved telecom infrastructure are some of the factors which are driving APAC automotive telematics market.

End Use Overview:

On the basis of end use, Asia Pacific automotive telematics market is segmented as infotainment, diagnosis, navigation, safety & security and others. Safety & security and diagnosis segments collectively contributed to about 50% of Asia Pacific automotive telematics market revenues in 2014. Infotainment application segment is identified as one of the fastest growing market during the forecast period with a CAGR of 12.6%.

Technology Overview:

On the basis of technology, Asia Pacific automotive telematics market is segmented as embedded, tethered and smart phone. Currently, embedded technology segment is dominating the market by and is projected to reach US$ 11,934.6 Million by 2020. Though, smart phone technology segment is estimated to capture lowest market revenue share of 7.6% in APAC automotive telematics market in 2014, it's expected to register a highest CAGR of 12.6% during forecast period.

Vehicle Overview:

Telematics technology can be integrated with passenger and commercial vehicles. Currently, passenger car segment has 88% market revenue share in Asia Pacific automotive telematics. Passenger car segment is expected to continue its dominance till 2020, due to high production and sales volume.

Regional Overview:

From country perspective, Asia Pacific automotive telematics market is segmented into India, China, Oceania, ASEAN, Japan and South Korea. Currently, China dominates the Asia Pacific automotive telematics market and accounts for around 45.4% market revenue share, followed by Japan and South Korea. China is forecast to continue its dominance in APAC automotive telematics market till 2020, as it's expected to capture a 45.3% market revenue share and expected to register a CAGR of 11.6% during forecast period. China, Japan and South Korea collectively contributed around 89% of the market revenues in 2014. ASEAN region is forecast to register a healthy CAGR of 12.6% during forecast period. India is expected to register a highest CAGR of 14.1% during forecast period.

Drivers and Trends:

Governments in advanced and emerging economies such as US, UK, Brazil, Singapore, India, have introduced regulations, policies and initiatives to increase the use of telematics in the automotive industry with a view to improving road safety. Increased acceptance of advanced technology and gadgets, such as mobile phones, laptops, smart phones, tablets, telecommunications, and various other technological goods in advanced and emerging regions has been witnessed in the last few years, particularly in the Asian region. As most of the manufacturers are competing to retain or increase their market share, some players are investing in innovating their product offerings by integrating new features and application in telematics.
devices. In order to maintain greater margins, OEMs capitalize on the convergence of digital content, wireless communication and automotive electronics. In the short term, however, telematics is expected to represent a product differentiation strategy rather than a revenue play. OEMs have created a new business model to complement their existing car making model. OEMs are investing in telematics to capture the untapped market. By 2020, they want to position their companies globally as the providers of content and services, just like phones or tablets.

There has been increasing adoption of emerging hybrid technology in vehicles (semi-autonomous vehicles are expected to become commonplace). The importance of remote vehicle diagnostics is slowly growing globally. Automotive OEMs are expected to continue investing in various technology advancements, such as integration of smart phones with the vehicle infotainment unit. This is expected to make embedded solutions more affordable and engaging.

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