

GPS



February 2010 US\$495

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GPS

Supplier capability in China

EXECUTIVE SUMMARY

China's GPS export industry is anticipating strong growth in 2010 as major economies start to recover from the global financial crunch. In fact, many suppliers expect significant sales increase in 2010 as the market for mobile location positioning expands even to developing countries.

Recent enhancements in software and hardware technologies have helped propel growth in the line further. Upgrades in user interface, wireless connectivity and functional convergence are among the key areas for R&D.

In addition, the descending cost of GPS chipsets, which contribute a large share to a unit's price, gives makers a larger profit leeway. For buyers, this translates to possible quote reductions in the months ahead.

China suppliers continue to cater to the low-end and midrange segments to avoid competing with leading overseas companies such as Garmin and TomTom.

The following are some of the key trends we see in China's GPS industry:

- More models, especially in-vehicle units, will feature multimedia capability. A number of portable devices now support JPEG, BMP, GIF and PNG files, and integrate FM stereos and games. A few designs enable mobile TV, mainly through DVB-T.
- The EU and North America will be the most important export markets for GPS makers but some will explore the Middle East and Asia to ramp up sales further.
- Since many GPS devices use similar chipsets and modules, China manufacturers are working on aesthetics to increase differentiation. Specifically, car and portable units in slimmer and rugged constructions, and accessories featuring colorful housings are in the pipeline.
- Amid the potential threat from the rising supply of GPS-enabled mobile phones, companies in China are advancing the navigation capability

of their releases. A number of portable units support traffic message channel or TMC, geofencing, assisted-GPS and location-based services or LBS.

- Export prices will be in a downward trend as the cost of GPS chipsets continues to decline. Generally, makers will cut quotes by 5 to 10 percent in the next six months.

This report covers portable and car GPS, trackers and data loggers, and accessories such as cases, holders and chargers.

For each product segment, the report details the latest design and technology trends, and highlights key factors that influence the price and quality of low-end, midrange and high-end releases.

Projections for the next six to 12 months on overseas sales, capacity expansion plans, export targets and R&D focus are detailed in the Supplier Survey.

The Industry Overview section stresses the key issues surrounding China GPS exporters, and their means of coping with these challenges. It also discusses developments in China's supply market amid the global economic slump and tightening price competition.

Reflecting the industry structure, more than 90 percent of makers interviewed for this report are located in Guangdong province, while the rest come from Zhejiang and Fujian provinces.

In addition, at least 80 percent of the companies are mainland China-owned, and the others are foreign- and Hong Kong-invested. Many of them have been offering GPS products for five to 10 years, and exporting more than 75 percent of their output.

All featured suppliers are manufacturers with direct export rights. Most makers in China concentrate on OEM and ODM business.

In this report

- 23 in-depth company profiles
- 91 top-selling export products
- Supplier demographics
- Supplier survey
- Industry statistics & charts

METHODOLOGY

To produce this report, Global Sources surveyed a wide range of suppliers. Rather than focus simply on high-profile makers, we compiled a representative sample of large, midsize and emerging manufacturers. All profiled companies are export-oriented professional suppliers that may or may not be clients of Global Sources.

The selection of suppliers is designed to reflect the composition of the industry in China in terms of geographic spread, business type and company ownership.

For in-depth company profiles, our research teams interviewed senior executives and export managers who discussed their recent performance and provided price, R&D, production and export forecasts for the next 12 months. The interviews were done in person, by phone or e-mail.

In each case, companies were required to answer specific questions designed to verify their manufacturing and export credentials, including their production and export statistics, and a breakdown of exports by product type and market. Our production checklist details the product-specific manufacturing capability of each supplier.

All profiled suppliers participated in a survey designed to provide insight into product and price trends, and challenges facing the industry. All survey questions are single choice. Results were calculated based on the actual number of valid responses to each question.

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INDUSTRY OVERVIEW

China's GPS products industry is poised for robust growth in 2010 as the global economic turmoil recedes. Maturing hardware and software technologies, sliding chip costs and the rising usage of GPS in automotive and personal tracking even in emerging markets such as India contribute to the positive forecast.

Market research firm RNCOS predicts a 17 percent CAGR from 2007 to 2010 for the mobile location positioning segment.

In this report, more than 60 percent of featured suppliers project 10 to 20 percent overseas sales growth in the next 12 months. Specifically, car and portable GPS are high-potential categories.

The bullish industry, however, is not without challenges.

As units built around the same chipset or module continue to flood the market, product differentiation has become a major challenge for makers.

Subcontracting is a cost-effective strategy for many small and midsize companies but doing so narrows design and feature demarcation further. It results in more similar products bearing different brands that may even originate in the same factory.

Suppliers, therefore, are undertaking efforts to distinguish their models from the rest and at the same time avoid price competition. For instance, makers are working on aesthetics, mainly by developing slimmer units and various surface finishes, including metal, rubber, ceramic and piano. In addition to the popular SiRFstarIII and Centrality Atlas III, more GPS solutions are being adopted such as u-blox and M-Star, which support low power consumption.

Another concern among China companies is the rising popularity of GPS phones and handsets. Mostly using the same chipsets as portable standalone units, some functions tend to be similar in both products. This poses a challenge to suppliers

to develop better navigation features that would separate their units from communication devices that integrate mobile location positioning only as an add-on.

But while the output of GPS-equipped phones is on the upswing, personal navigation models remain stronger based on smart phone solution production, especially for the car segment. The overall shipments of PNDs worldwide are estimated at 47 million units in 2009, according to Strategy Analytics.

Technology trends

3-D UI and real-view navigation maps are fast becoming mainstream features of high-end car and portable GPS. Models with multidimensional interface, however, require memory cards with at least 8GB capacity. To read Google maps, units need a minimum of 2GB RAM and a 12GB memory card.

The use of multitouch technology is also gaining ground among GPS product suppliers in China.

Wireless connectivity, particularly via Bluetooth, is another direction most companies are taking. More units with Wi-Fi, GSM/GPRS and 3G capability are also in the pipeline. Some GPS models adopt handset modules, can send and receive SMS and MMS, and make phone calls.

In line with this trend, the functional convergence of personal electronic devices is receiving increased attention.

Suppliers of vehicle GPS, in particular, are adding entertainment features in hopes of competing with car multimedia players that incorporate navigation functions.

Further, manufacturers of portable receivers combine value-added features to position products better against multimedia mobile phones. Many portable devices support JPEG, BMP, GIF and PNG files. Other models integrate FM stereos and games. A few

Supplier summary

Suppliers surveyed	23
Export sales	\$173.8mn
Export ratio	87%
OEM business	45%
Capacity utilized	47%
Annual R&D spending	\$52.2mn
Full-time employees	14,922

Data: All surveyed suppliers

units enable mobile TV, mainly through DVB-T, CMMB and DMB-T/H.

In the vehicle tracking segment, a number of makers are turning into online service providers. Such companies build websites from which GPS users can track automobiles conveniently. The system is accessible worldwide as long as there is an Internet connection and GPS signal. Suppliers usually charge \$10 to \$90 per year for real-time monitoring access.

Map software R&D still raw

Despite recent advances in hardware development, China companies continue to be hard-pressed to take map and navigation software development a step higher.

Most enterprises provide portable GPS devices without map programs. Some makers buy the software for the target markets and integrate this into their export-bound products. Although more costly, this method fulfills requirements and reduces the risk of incompatibility with regulations in the destination markets.

In China's mapping and navigation software industry, companies generally focus on domestic sales. Few have plans to enter overseas markets in the near term.

In fact, the State Bureau of Surveying and Mapping has qualified only 11 China suppliers of electronic maps for navigation. Of these, four are actively engaged in the collection and production of map information and data. Even leading PND navigation map providers may not collect and produce data.

Coban Group Co. Ltd

Coban exports all of the \$9 million worth of GPS products it manufactures each year. Monthly shipments of the line, which consists of GPS trackers and data loggers, total 10,000 units.

Operations take place in two factories in Guangdong province. The facilities, covering a combined area of 3,000sqm, run at 50 percent of capacity.

Annual revenue from all products reaches \$10 million. Sales from abroad are expected to grow by more than 20 percent in the next 12 months, during which the EU will be the company's target market.

With about \$1.5 million invested in R&D each year, the supplier is able to release designs that are shipped to North America, the EU, Eastern Europe, the Asia-Pacific region and the Middle East. These are 80 percent OEM and 20 percent ODM orders.

Export prices of GPS stayed the same in the past three months.

To boost global competitiveness, Coban will focus on better software capability and likewise shorten the designing process. It will also increase capital spending up to 50 percent in 2010.

Company facts

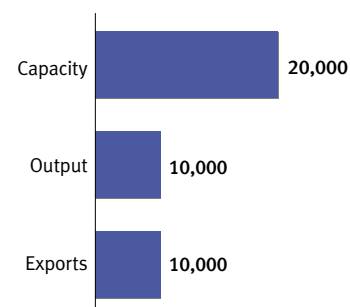
Year established	1999
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Shenzhen (Guangdong)
Number of factories	2
Factory location(s)	Shenzhen (Guangdong)
Total factory area	3,000sqm
No. of full-time employees	200
No. of R&D/design staff	15
No. of QC staff	30
Annual sales (all products)	\$10.0mn
Annual R&D spending	\$1.5mn
ISO certification	No

Sales & output: GPS

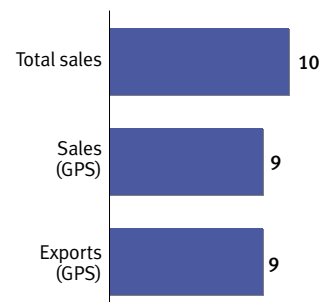
Annual sales	\$9.0mn
Share of total sales	90%
Annual export sales	\$9.0mn
Total monthly capacity	20,000 units
Average monthly output	10,000 units
Capacity utilized	50%
Average monthly exports	10,000 units
Export ratio	100%
OEM % of exports	80%
ODM % of exports	20%
OBM % of exports	—

Profile

Production units/mth



Sales \$mn/yr



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Capability

In-house processes

SMT	Yes
Module making	No
PCB assembly	Yes
Cosmetic design	Yes
Mold making	Yes
Plastic injection	Yes
Software design	Yes
Silkscreen/offset printing	Yes

Exports by product

Portable GPS	—
GPS trackers & data loggers	100%
GPS accessories	—
Car GPS	—

Exports by market

North America	20%
European Union	30%
Europe (non-EU)	15%
Asia-Pacific	20%
Middle East	10%
Other	5%

Survey

- **Export prices**
Stayed the same
- **Export sales**
Increase more than 20%
- **Target market**
European Union
- **Capital expenditure**
Increase up to 50%
- **Major challenge**
Yuan-USD exchange rate
- **Export capability**
Shorten design/development time
- **R&D focus**
Better software capability

Popular export models



GPS tracker & data logger

Model	GPS103
MOQ	1 set
Packaging	Colored box
Delivery	3 days
Price	•

Description: GSM/GPRS; 850/900/1,800/1,900 or 900/1,800/1,900MHz; SiRFstarIII chip; Simcom 300/340d module; -159dBm sensitivity; 5m position accuracy; 12V input car charger; chargeable, replaceable 3.7V 800mAh Li-ion battery; 83x54x26mm; 115g



GPS tracker & data logger

Model	GPS102
MOQ	1 set
Packaging	Colored box
Delivery	3 days
Price	•

Description: GSM/GPRS; 850/900/1,800/1,900 or 900/1,800/1,900MHz; SiRFstarIII chip; Simcom 300/340 module; -159dBm sensitivity; 5m position accuracy; 12 to 24V input, 5V output car charger; chargeable, replaceable 3.7V 800mAh Li-ion battery; 80hr standby time; 64x46x17mm

• Information not disclosed

PRODUCT GALLERY

Car GPS



Kinwei
(profile page 38)
Model: KW-GM5005M
MOQ: 200 units
Packaging: Gift box
Delivery: 15 days
Price: •
Description: MStar MSB2501 chip; 5in TFT LCD, 480x272-pixel resolution; 64MB DDR2, 128MB to 2GB NAND flash memory; built-in passive ceramic GPS antenna; 0.1m/s acquisition time; 90% accuracy; USB 2.0, COM2 interfaces; Windows CE 5.0; FM transmitter



Kinwei
(profile page 38)
Model: KW-GM5008M
MOQ: 200 units
Packaging: Gift box
Delivery: 15 days
Price: •
Description: MStar MSB2501 chip; 5in TFT LCD, 480x272-pixel resolution; 64MB DDR2, 128MB to 2GB NAND flash memory; built-in passive ceramic GPS antenna; 0.1m/s acquisition time; 90% accuracy; USB 2.0, COM2 interfaces; Windows CE 5.0; FM transmitter



Kinwei
(profile page 38)
Model: KW-GM4317M
MOQ: 200 units
Packaging: Gift box
Delivery: 15 days
Price: •
Description: MStar MSB2501 chip; 4.3in TFT LCD, 480x272-pixel resolution; 64MB DDR2, 128MB to 2GB NAND flash memory; built-in passive ceramic GPS antenna; 0.1m/s acquisition time; 90% accuracy; USB 2.0, COM2 interfaces; Windows CE 5.0; FM transmitter



Kinwei
(profile page 38)
Model: KW-GM5001
MOQ: 200 units
Packaging: Gift box
Delivery: 15 days
Price: •
Description: Samsung S3C2416 chip; 5in TFT LCD, 480x272-pixel resolution; 64 to 128MB DDR2, 64MB to 2GB NAND flash memory; built-in active ceramic antenna; 0.1s average acquisition time; 90% accuracy; USB 2.0, COM2 interfaces; Windows CE 5.0; FM transmitter

• Information not disclosed



Kinwei
(profile page 38)
Model: KW-GM4315
MOQ: 200 units
Packaging: Gift box
Delivery: 15 days
Price: •
Description: Samsung S3C2416 chip; 4.3in TFT LCD, 480x272-pixel resolution; 64 to 128MB DDR2, 64MB to 2GB NAND flash memory; built-in active ceramic antenna; 0.1s average acquisition time; 90% accuracy; USB 2.0, COM2 interfaces; Windows CE 5.0; FM transmitter



Kinwei
(profile page 38)
Model: KW-GM7002
MOQ: 200 units
Packaging: Gift box
Delivery: 15 days
Price: •
Description: Samsung S3C2451 chip; 7in TFT LCD, 800x480-pixel resolution; 64 to 128MB DDR2, 64MB to 2GB NAND flash memory; built-in SiRFstarIII sensitive antenna; 0.1s average acquisition time; 90% accuracy; USB 2.0, COM2 interfaces; Windows CE 5.0; FM transmitter

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