

Global OEM Manufacturing and Design Analysis (GOMDA)[™] – Portable Navigation Devices

Who's Designing What? Who's Building What?

By Jeffrey Wu, Analyst

Forecast**Frequency, Time Period**

- Annual update; 5-year period

Measures

- Units

Sectors Covered

- OEM
- EMS
- ODM

Detail Level

- Units produced by a node of the supply chain (OEM, EMS, or ODM) in a given year with the most recent year's detailed volume breakdown by company

Relationship Map

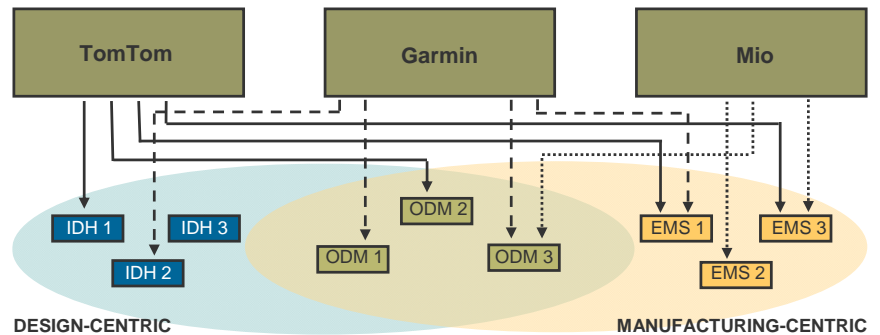
- Each OEM's contract manufacturers and their respective share splits
- Each contract manufacturer's shipment breakdown by OEM client

2008 Application Markets Covered

- Portable Navigation Devices (TomTom, Garmin, Mio, Navman (acquired by Mio), Magellan, Medion, Acer, Lowrance, PalmOne, Fujitsu, Trimble, etc)

Original Equipment Manufacturers (OEMs), Electronics Manufacturing Service (EMS) providers, Original Design Manufacturers (ODMs) are looking aggressively to capitalize on the high growth in the PND industry. Leading OEMs that continue to rationalize their supply chains and smaller OEMs that operate in niche markets will increasingly utilize external partners for design and manufacturing services to concentrate on their core competencies and better their competitive positions.

To help concerned managers navigate the PND OEM's supply chains, identify business opportunities and conduct competitive analysis, iSuppli developed the Global OEM Manufacturing and Design Analysis (GOMDA)[™] PND module. This unique GOMDA module examines the design and manufacturing activities and outsourcing strategies employed by leading PND OEMs. It also tracks the relationship maps of these OEMs across their extended supply chain (EMS, ODM, independent design houses, component suppliers) to address the critical questions referenced below.

**Critical Questions Answered**

- Who designs for an OEM? What roles do these design houses play in an OEM's product development process? Their locations and capabilities?
- Who builds for an OEM? Where do these contract manufacturers build? What are the share splits of these contract manufacturers for an OEM?
- What are the key outsourcing strategies of leading OEMs? Why are an OEM's design / manufacturing activities insourced or outsourced?
- How do these outsourcing strategies dictate the design and manufacturing relationships across the supply chain? What are the outsourcing trends?
- How might the evolution of contract manufacturers impact OEMs and component suppliers?
- What should I know about my peers' competitive positions in order to better penetrate and service OEMs and contract manufacturers?

Who Should Read This?

- Component Suppliers
- OEMs
- EMS providers
- ODMs
- Financial Analysts
- Consultants
- Independent Design Houses

Lead Analyst

Jeffrey Wu, Senior Analyst

Prior to joining iSuppli, Jeffrey worked for leading technology companies such as BenQ, Acer Communications and Multimedia, and Dell, where his main responsibilities included channel management, product management, and OEM project management.

While working on the OEM engagement, he was in charge of cost estimation, cost reduction, logistics and service terms negotiation, and Supplier-Managed Inventory implementation.

At iSuppli Corp., Jeffrey is responsible for the analysis and projection of the trends and dynamics of the electronics contract manufacturing industry.

Jeffrey earned a Bachelor of Science degree in Computer Science from Taiwan University and a Master of Business Administration degree from the University of Michigan.

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Findings and Implications

- For OEMs
- For Contract Manufacturers
- For Component Suppliers

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- Major Players and Industry Concentration
- Value Chain of the PND Industry and Terminology
- Trends of the PND Industry

PND OEM Profiles

- Garmin
- TomTom
- Mio
- Magellan
- Navman
- Medion
- Becker
- Navigon
- ViaMichelin
- Sony

Benchmarking of OEMs – Design Center Footprint, Manufacturing Profiles, Manufacturing

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PND Contract Manufacturers

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Navigon's PND Manufacturing Partners and Share Splits

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IAC's Major PND ODM Customers and Share Splits

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