

Automotive Infotainment Semiconductor Market Tracker

Infotainment: Driving Automotive Out of the Downturn

By Richard Robinson, Principal Analyst

Forecast**Frequency, Time Period**

- 3-year historical data
- 5-year annual forecasts

Measures

- Revenue
- Units

Regions, Markets

- Americas
- EMEA
- China
- Japan
- Rest of Asia Pacific

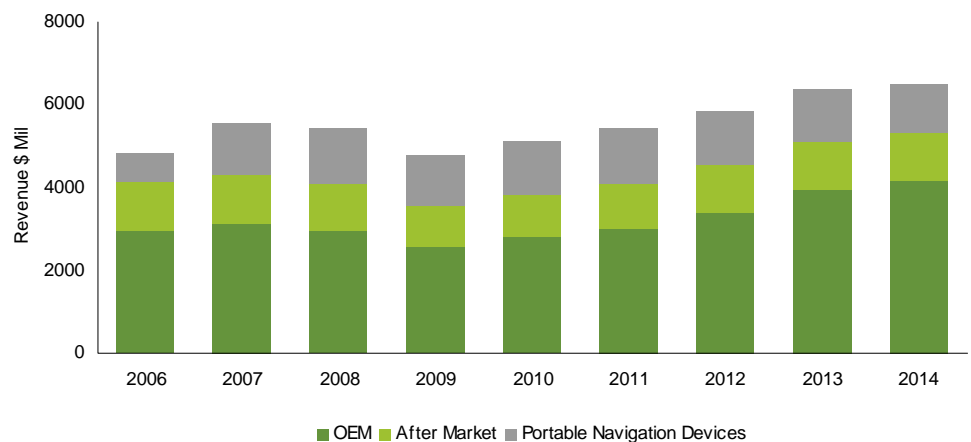
Technologies Covered

- Application Specific ICs:
 - Audio
 - Video
 - Navigation
 - Media management
 - Audio amplifiers
- MCUs
- MPUs
- GPUs
- DRAM, Flash, other memory
- Power discretes and ICs
- Standard linear and logic
- Optoelectronics
- Sensors

After the downturn in 2008 and 2009, the automotive infotainment market will be driven by opportunities created by silicon suppliers who will see their market expand to \$6 billion by 2014, up from \$4.2 billion in 2009. Silicon suppliers to the Portable Navigation Market (PNDs) will generate revenues of \$1 billion per year between 2009 and 2011 before falling back to \$800 Million in 2014.

The Semiconductor tracker from iSuppli examines the opportunities and supply trends for semiconductor suppliers to the expanding automotive infotainment market. The semiconductor service includes semiconductor market share information and revenue splits for the top 22 silicon suppliers to the Infotainment market by application.

Infotainment Worldwide: All Semiconductors

**Critical Questions Answered**

- What are the critical entry points for silicon suppliers to the vehicle market?
- What are the silicon opportunities for portable device connectivity?
- What are chip opportunities for terrestrial and satellite receiver technologies?
- What are the silicon revenues and unit volumes in automotive by geographic region?
- What are the hottest semiconductor market opportunities in automotive?

Who Should Read This?

- EMS / OEMs / ODMs / Software Developers
 - Planning
 - Procurement
 - Engineering
- OEMs / EMS / ODMs / Component Suppliers
 - Marketing

Lead Analyst**Richard Robinson,
Principal Analyst**

Richard comes to iSuppli from his previous position in Alpine Electronics in Europe where he lead Advanced Research Projects. His primary responsibility at iSuppli is to provide vendors with insightful analysis of the increasingly complex 'Automotive Infotainment' value chain.

Richard is an expert in car-navigation and Human-Machine-Interfaces (HMI). He has lead interface design breakthroughs including the world's first production automotive-interface using Macromedia Flash (New Jaguar XK/2006 Freelander) He has also been a key HMI consultant on several award winning OEM navigation systems for Honda and Acura. (JD Power #1: 2001-2005)

Richard has BA from the University of Natal in Durban, South Africa.

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In-Vehicle Connectivity

- Bluetooth and USB: The Wireless and Wired Choices
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Telematics

- Separate ECU (OnStar type)

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Telematics: OEM Head Unit Silicon TAM to 2015

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Terrestrial Digital Radio Worldwide: DAB and HD Radio Silicon

Sirius XM Satellite Radio Silicon: OEM and Aftermarket

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PND Silicon Detail

Terrestrial Radio Silicon Detail

Sirius XM Satellite Radio: OEM and Aftermarket Silicon

Infotainment Silicon Market Shares 2008 (Application Specific)