

Automotive Research Topical Report

Next Generation Headunit Design: Beyond Just Hardware

By Richard Robinson, Principal Analyst

Forecast

Frequency, Time Period

- 3-year historical data
- 7-year annual forecasts

Measures

- Revenue
- Units

Regions, Markets

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

Applications/Products Covered

- OEM and After Market Headunit design
- Infotainment Semiconductors
- Infotainment Systems
- Navigation
- Telematics
- Connectivity
- Audio and Video media support

Technologies Covered

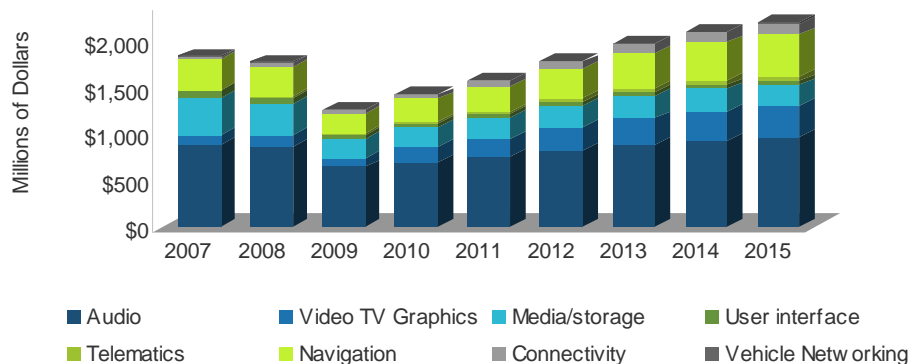
- Silicon: ASIC/ASSP/MCUs, DRAM, Flash, Power, Optical, Sensor, etc)
- Systems: Headunit, Navigation, Telematics, Connectivity, Digital Terrestrial and satellite radio

The increasing functionality available on inexpensive devices such as Portable Navigation Devices (PNDs) and Personal Media Players (PMPs) is leading consumers to expect equivalent capabilities from their embedded headunits at little or no additional cost.

Clearly there is an opportunity for some vehicle manufacturers to take advantage of this evolving competitive situation to differentiate themselves in the market, and by so doing, improve the take rates of the audio, visual and interface features, which in turn are likely to lead to lower per-unit-costs and increased customer satisfaction. The question is: "Where does this leave the OEMs in terms of the value-add on next generation headunit/infotainment design?"

This report details the requirements in next-generation headunit design, with feature analysis and an overview of the semiconductor opportunities in navigation, Telematics, Connectivity, Storage and Media Playback including compressed audio and Digital radio.

Headunit Semiconductor opportunity 2007 – 2015 (OEM and After Market)



Critical Questions Answered

- How should vehicle OEM's add-value to their headunit design in next generation systems?
- Who are the top 15 headunit suppliers and what are their market shares globally?
- What are the system revenues and unit volumes in headunit connectivity, Branded Audio, Mobile TV and Digital Radio by geographic region?
- What are the opportunities for display suppliers in the new HMI centered cockpit?

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 Robinson moved to iSuppli from his previous position at Alpine Electronics where he led Infotainment, Navigation and Advanced Research Projects in Europe, Japan and North America.

Richard initiated iSuppli's Automotive Semiconductor research in 2006, and he has the primary responsibility of providing vendors with actionable advice and insightful analysis of the increasingly complex Automotive Infotainment value chain. This value chain analysis has allowed iSuppli to develop forecasts on the production of automotive electronic equipment, and the corresponding demand created for electronics components including highly detailed views of the Infotainment semiconductor market.

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/XF, Freelander) He has also been a key HMI consultant on several award winning OEM navigation systems for Honda and Acura. (JD Power No.1: 2001-2005).

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

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