

China Electronic Components Industry Report, 2010



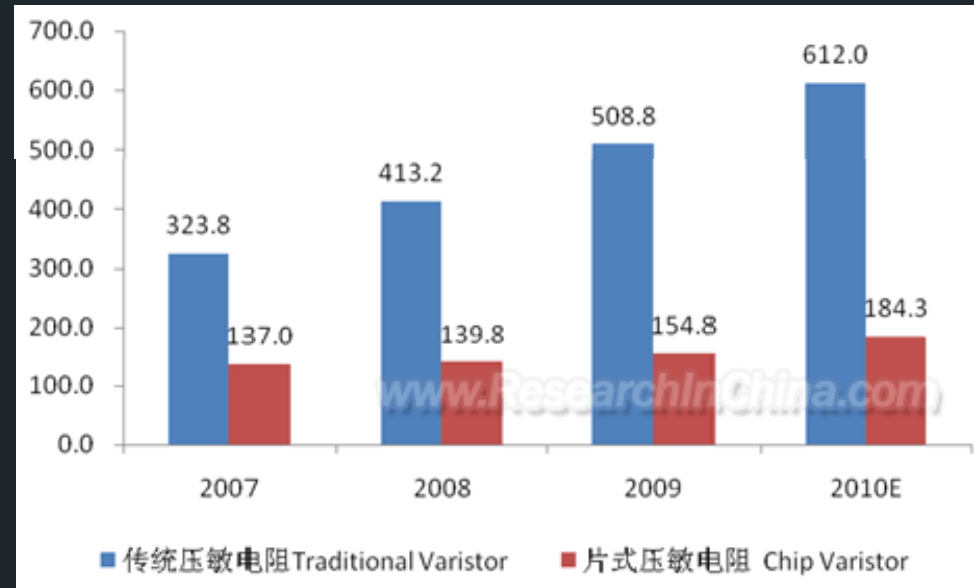
After bottoming out in Q2 2009, China electronic components industry experienced rapid growth in H1 2010, and is likely to maintain steady growth in H2 2010. It's expected that the sales revenue will grow by 15%, and export will grow by over 20% in 2010. From 2011 to 2012, China electronic components industry will develop at a high growth rate, mainly driven by downstream demand and industrial transfer.

After the financial crisis, China consumer electronics industry has recovered, and 3G network construction has been carried out steadily. The “Internet of Things”, a strategic industry of China, has been paid more attention than ever before. A great number of emerging fields, such as new energy vehicles and efficient lighting, have huge demand for electronic components. In the wake of the financial crisis, international manufacturers have paid much more attention to brand building and channel management, and have accelerated to transfer product manufacturing to Asia-Pacific. In addition, China’s import of electronic components valued more than US\$40 billion annually in recent five years. The imported electronic components valued US\$ 48.84 billion in 2009. Therefore, the import substitution market has huge potentials.

In China, most of the resistance potentiometers are mid-to-low-end products, while high-end field has not been fully explored. Resistance potentiometer market will develop at an annual growth rate of around 20% in next three years. Traditional wire-wound resistor potentiometers are applied to various fields, so they will still account for large shares of electronic components. Chip varistors are promising in the future, mainly driven by the promotion of downstream smartphone. Currently, 90% of mobile phone chip varistors are imported.

In China, chip capacitors account for more than 70% of capacitors. Multi-layer ceramic capacitor (MLCC) accounts for 80% of chip capacitors output. MLCC output grew by 32.3% in 2008, slightly higher than the growth rate in 2009. 3C upgrading, functional phones to smart phones, 3G mobile phones, PC upgrading and considerable shipment of LCD TV will make MLCC grow at a high rate in the coming years. From 2010 to 2012, the demand for thin film capacitor will be mainly from energy-saving lamp market. Suppose an energy saving lamp needs 6-8 thin film capacitors, the potential market demand will reach 26-32 billion thin film capacitors.

China Varistor Market Sales, 2007-2010 (RMB mln)



Source: ResearchInChina

Asian connector market has the biggest potentials, while Chinese connector market will have the fastest growth rate and the largest capacity in the world. In 2010, Chinese connector market will value more than RMB 58 billion, and the popularity of 3G mobile phones will make the demand for high-end connectors grow rapidly. Considerable shipment of flat-panel TV will provide market opportunities for household connectors. 3G and FTTx are the main driving forces that boost communications connector market during 2010-2012, and connector market will achieve additional revenue of RMB1.5 billion each year.

China has become the production and processing center of electro-acoustic devices in the world. From 2010 to 2012, the domestic market demand for electro-acoustic devices for TVs, communication products, home theaters and electronic toys will be considerable. Car audio is also a key application field of electro-acoustic devices. In addition, overseas orders will be an important reason for the output growth of domestic manufacturers.

In recent years, Chinese sensor market has been growing at a rate of over 39%. In 2009, the market valued RMB32.7 billion. Emerging sensor sectors include wireless sensor, MEMS (micro electromechanical system), biological sensor and so on. Now, Mainland China's industrial chains in these application fields are still very weak. Infrared detection devices will experience substantial growth in sensor application in China in the next few years.

Table of Contents

- **1. Overview**
- 1.1 Research Focus
- 1.2 Basic Conclusions

- **2. Development and Trend of Electronic Components Industry**
- 2.1 World
- 2.2 China

- **3. Resistor**
- 3.1 Chinese Resistor Market
- 3.2 Chip Varistor
- 3.3 Shenzhen Sunlord Electronics Co. Ltd.
- 3.4 HYLINK Technology Co., Ltd.

- **4. Capacitor**
- 4.1 Capacitor Application Industry
- 4.2 Current Situation of Chinese Capacitor Market
- 4.3 Development Space of Chinese Capacitor Market
- 4.4 MLCC Market
- 4.5 Xiamen Faratronic Co., Ltd.
- 4.6 Guangdong Fenghua Advanced Technology (Holding) Co., Ltd.
- 4.7 EYANG Holdings (Group) Co., Ltd.

- **5. Connector**
- 5.1 Market
- 5.2 Development Trends
- 5.3 Shenzhen Deren Electronic Co., Ltd.
- 5.4 SUNSEA Telecommunications Co., Ltd.
- 5.5 Guizhou Space Appliance Co., Ltd.
- 5.4 China Aviation Optical-Electrical Technology Co., Ltd.

- **6. Electro-acoustic Device**
- 6.1 Market
- 6.2 Development Trends
- 6.3 Guoguang Electric Co., Ltd.
- 6.4 GoerTek Inc.

- 6.5 Zhejiang East Crystal Electronic Co., Ltd.
- 6.6 Zhejiang New Jialian Electronics

- **7. Sensor**
- 7.1 Sensor Market
- 7.2 Infrared Thermal Imager Market
- 7.3 Henan Hanwei Electronics Co., Ltd.
- 7. 4 Wuhan Guide Infrared Co., Ltd
- 7.5 Zhejiang Dali Technology Co., Ltd.
- 7.6 Wuhan Huagong Xingali Electron Co., Ltd.

Selected Charts

- Sales of the World's Four Major Electronic Components Markets, 2006-2009
- Output Value of Major Electronic Components in USA, 2006-2009
- Output Value of Electronic Components in Japan (by Product), 2004-2009
- Output Value of Major Electronic Components in Western Europe, 2006-2009
- Output Value of Major Electronic Components in Four Areas of Asia-Pacific, 2006-2009
- Monthly Output and Growth Rate of Electronic Components in China, 2009
- Output of China Electronic Components Industry (by Product), 2004-2008
- Output Value of China Electronic Components Industry (by Region), 2008
- Application Fields of Multilayer Chip Varistor, 2008
- Chip Varistor Market Scale in China, 2002-2007
- Sunlord's Main Business Revenue and Growth Rate, 2007-2010
- Sunlord's Main Business Revenue Structure (by Product), 2007-2010
- Sunlord's Main Business Gross Margin (by Product), 2007-2009
- Sunlord's Main Business Revenue Structure (by Region), 2007-2010
- Achieved Benefits of Projects Invested by Sunlord, 2009
- Projects to be Invested by Sunlord, 2010
- HYLINK's Operating Revenue and Expenditure
- Capacitor Market Sales (by Product), 2008
- Downstream Application Fields of MLCC, 2009
- MLCCs Per Mobile Phone
- Faratronic's Main Business Revenue and Growth Rate, 2007-2010
- Faratronic's Main Business Revenue Structure (by Application), 2010
- Faratronic's Main Business Revenue Structure (by Product) , 2007-2010

- Faratronic's Main Business Revenue Structure (by Region), 2007-2010
- Main Business Revenue and Growth Rate of Fenghua Advanced Technology, 2007-2010
- Main Business Gross Margin (by Product) of Fenghua Advanced Technology, 2007-2009
- Main Business Revenue Structure (by Product) of Fenghua Advanced Technology, 2007-2010
- EYANG's Main Business Revenue Structure (by Product), 2004-2009
- Sales and Growth Rate of Global Connector Market, 2007-2010
- Sales and Growth Rate of Chinese Connector Market, 2007-2010
- Structure of Chinese Connector Market, 2010
- Structure of Chinese Connector Market (by Nature of Enterprise), 2009
- Global and China Flat Panel TV Shipment and Growth Rate, 2009-2011
- Communications Network Physical Connection Equipment Market in China, 2006-2012
- Deren's Industrial Structure
- Deren's Main Business Revenue and Growth Rate, 2007-2010
- Deren's Gross Margin, 2007-2009
- Deren's Operating Revenue Structure (by Product), 2007-2010
- Deren's Main Business Revenue Structure (by Region), 2007-2010
- SUNSEA's Main Business Revenue and Growth Rate, 2007-2010
- SUNSEA's Main Business Gross Margin (by Product), 2007-2010
- SUNSEA's Main Business Revenue Structure (by Product), 2007-2010
- SUNSEA's Main Business Revenue Structure (by Region), 2007-2010
- Organizational Structure of Space Appliance
- Main Business and Growth Rate of Space Appliance, 2007-2010
- Main Business Revenue Structure of Space Appliance (by Product), 2007-2009

- Main Business Revenue and Growth Rate of China Aviation Optical-Electrical, 2007-2010
- Main Business Revenue Structure (by Product) of China Aviation Optical-Electrical, 2007-2009
- Main Business Gross Margin (by Product) of China Aviation Optical-Electrical, 2007-2009
- Main Business Revenue Structure (by Region) of China Aviation Optical-Electrical, 2007-2009
- Guoguang's Equity Investment Framework, 2010
- Guoguang's Main Business Revenue and Growth Rate, 2007-2010
- Guoguang's Main Business Gross Margin (by Product), 2007-2010
- Guoguang's Main Business Revenue Structure (by Application), 2007-2009
- Guoguang's Main Business Revenue Structure (by Region), 2007-2009
- GoerTek's Main Business Revenue and Growth Rate, 2007-2009
- GoerTek's Main Business Revenue Structure (by Region), 2007-2009
- Main Business Revenue and Growth Rate of East Crystal Electronic, 2007-2010
- Main Business Revenue Structure (by Product) of East Crystal Electronic, 2007-2010
- Main Business Gross Margin (by Product) of East Crystal Electronic, 2007-2010
- Main Business Revenue Structure (by Region) of East Crystal Electronic, 2007-2009
- Planned Investment Spending of East Crystal Electronic, 2010
- Main Business Revenue and Growth Rate of New Jialian, 2007-2009
- Main Business Revenue Structure (by Product) of New Jialian, 2007-2009
- Main Business Gross Margin (by Product) of New Jialian, 2007-2009
- Main Business Revenue Structure (by Region) of New Jialian, 2007-2009
- Chinese Sensor market Scale, 2005-2009
- Civilian Market Capacity of China Infrared Thermal Imagers (by Application)
- Main Business Revenue and Growth Rate of Hanwei Electronics, 2007-2010

- Main Business Revenue Structure (by Product) of Hanwei Electronics, 2007-2009
- Main Business Gross Margin (by Product) of Hanwei Electronics, 2007-2009
- Main Business Revenue Structure (by Region) of Hanwei Electronics, 2007-2009
- Planned Investment Projects of Hanwei Electronics, 2010
- Main Business Revenue and Growth Rate of Guide Infrared, 2007-2009
- Main Business Revenue Structure (by Product) of Guide Infrared, 2007-2009
- Main Business Gross Margin (by Product) of Guide Infrared, 2007-2009
- Main Business Revenue Structure (by Region) of Guide Infrared, 2007-2009
- Project Investment of Guide Infrared, 2010
- Main Business Revenue and Growth Rate of Dali Technology, 2007-2010
- Main Business Revenue Structure (by Product) of Dali Technology, 2007-2009
- Main Business Gross Margin (by Product) of Dali Technology, 2007-2009
- Main Business Revenue Structure (by Region) of Dali Technology, 2007-2009
- Main Business Revenue and Gross Margin of Huagong XinGaoLi, 2007-2010
- Major Manufacturers of Chip Varistor in China
- Major MLCC Manufacturers in China
- Major Manufacturers of Multilayer Chip Inductors in China

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