



Global and China Mobile Phone Baseband Industry Report, 2010

Dec. 2010

This report

- ◆ **Illustrates mobile phone market, smart phone design, mobile phone baseband industry and development direction**
- ◆ **Analyzes the baseband application of mobile phone manufacturers, also operation of baseband manufacturers**

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Abstract

STMicroelectronics, EMP and NXP's wireless division merged to be ST-ERICSSON, which has not given play to the synergy, while its revenue has started to decline, with the more drastic drop in growth margin than other mobile baseband peers. ST-ERICSSON has suffered losses for consecutive 13 quarters, mainly on account of the competition from Qualcomm, TI and Infineon. Particularly in the field of smart phones, ST-ERICSSON really has nothing good or unusual to report, while Qualcomm develops well in the world since 90% of the smart phones made by Samsung and SonyEricsson adopt Qualcomm's basebands. Nokia develops more suppliers actively, and the shipment of its mobile phone with the basebands of Infineon and Broadcom soared in 2010, which grasps the market shares of ST-Ericsson. In respect of TD-SCDMA, ST-Ericsson is challenged by MTK.

Revenue of Major Mobile Phone Baseband Vendors in the World, 2009-2010

	Revenue in 2009 (USD mln)	Revenue in 2010 (USD mln)	Growth Rate
ST-ERICSSON	2054	1810	-12.3%
SPREADTRUM	105	296	181.9%
MTK	2485	2510	2.1%
QUALCOMM	6135	6580	7.3%
TI	1725	1708	-1%
FREESCALE	418	296	-29.2%
INFINEON	917	1780	94.1%
BROADCOM	138	251	81.9%
MARVELL	298	602	102.0%

Source: ResearchInChina

In 2010, Spreadtrum took the chance of MTK's mistake to aggressively seize MTK's shares in knockoff cellphone market, so that the shipment of Spreadtrum increased significantly, its revenue tripled and its operating profit rose greatly. However, MTK will not always make mistakes, and the absence of Spreadtrum in the arena of 4G and smart phone limits its development.

In 2010, MTK almost made a fatal error because of the application of QFN packaging. MTK overrated the SMT chip placement capability of mobile phone manufacturers in Mainland China. Fortunately, MTK timely adjusted its strategy, and the SMT chip placement capability of mobile phone manufacturers in Mainland China was enhanced hereby. Finally, MTK protected its position. Yet, MTK does not have the ability to achieve high-speed growth any more. Like Spreadtrum, that MTK is not engaged in the field of 4G and smart phone restricts its development, which can be shown from the brain-drain of top talents of MTK.

Qualcomm has further consolidated its leading position in the areas of CDMA, WCDMA and smart phones. Also, the leadership of Qualcomm in smart phone field gets enhanced. After Intel acquired Infineon's wireless division, Qualcomm is likely to enter Apple's supply chain. If smart phone is defined in a stricter sense, Qualcomm is almost Intel which is the giant in PC industry. Apart from Apple, the CPU of all top mainstream smart phones comes from Qualcomm. In 2010, Qualcomm had to keep a low profile and lowered its prices slightly in order to occupy market shares. With many years of cooperation with TSMC as well as 65nm and 45nm technologies, Qualcomm will see the rising gross margin in spite of the lowered prices. Qualcomm has placed an additional order to TSMC for 700,000 pieces of 12-inch wafer in 2011, because the order backlog of Qualcomm has arranged till 2012.

TI performed well in 2010. Thanks to the massive shipment of Nokia's smart phones, TI has stable shipment of high-priced products. TI's RAPUYAMA has replaced RAPIDOYAWE jointly developed by Nokia and FREESCALE. New smart phones of Nokia without exception employ RAPUYAMA as basebands. Although RAPUYAMA doesn't deliver high operating speed, to Nokia it's competent and economical. However, excessive correlative dependence is risky for both Nokia and TI. Nokia has tried to apply the basebands of QUALCOMM to its smart phones.

FREESCALE has transferred from baseband to application processor, so a decline in performance is inevitable.

INFINEON's wireless division was acquired by Intel at the end of August 2010, and the acquisition will be completed in Q1 2011. INFINEON's business is booming in 2010, its largest client Apple has delivered a remarkable performance, and its large initial-stage investment in Nokia has finally been paid back with soaring shipments. INFINEON's wireless division experienced even higher profit growth. Its operating profit achieved EUR142 million in the first three quarters of 2010, a substantial increase compared with EUR8 million in the same period of 2008.

However, as mobile phone business needs continuous considerable financial and human resource investment, INFINEON has acknowledged its inferiority in this regard, especially to its rival QUALCOMM which has established an extensive presence in 4G and 5G areas. Compared with INFINEON's automotive, industrial control and smart card divisions, the wireless division made meager profit, so INFINEON decided to sell the division. At the time, Intel had been seeking for new development opportunities in the fields other than PC, and was confident that it's powerful enough to contend with QUALCOMM, so it acquired INFINEON's wireless division. In a short term, the wireless division will bring satisfying profit to Intel. Apple will not give up the long-term partner and design architecture quickly. In the CDMA field, INFINEON has no corresponding products, so Apple will adopt QUALCOMM's products.

BROADCOM has a very wide business scope and diversified products. With insufficient investment, its mobile phone baseband business has been sluggish for years. However, in 2010, after years of development, BROADCOM finally saw its shipment to Nokia and Samsung rise significantly. At the same time, BROADCOM develops 4G actively. In October 2010, BROADCOM acquired Beceem for USD316 million.

Benefitting from the growth of its major client RIM and the smart phone sector, Marvell has achieved good financial results. As RIM is losing the battle with Apple, Marvell has to consider how to develop new clients or increase the shares of new clients.

MStar, going public recently, has been widely recognized as a promising enterprise, but will encounter the difficulties of MTK and SPREADTRUM sooner or later. During the first three quarters in 2010, MStar only gained RMB220 million from the mobile phone business into which it has put much effort.

1. Mobile Phone Market

- 1.1 Overview
- 1.2 Market Share

2. Smart Phone Design

- 2.1 BlackBerry Bold
- 2.2 BlackBerry Storm
- 2.3 HTC Touch
- 2.4 Sony Ericsson XPERIA X1
- 2.5 T-Mobile T1
- 2.6 MOTO Krave ZN4
- 2.7 MOTO Droid2
- 2.8 iPhone 4
- 2.9 HTC EVO 4G
- 2.10 HTC Droid
- 2.11 Nokia N8

3. Mobile Phone Baseband Industry & Development Direction

- 3.1 Mobile Phone Kernel Roadmap
 - 3.1.1 Cortex-A9
 - 3.1.2 Cortex A5
 - 3.1.3 Mali GPU
 - 3.1.4 Imagination PowerVR
- 3.2 Mobile Phone Baseband Industry

4. Baseband Application of Mobile Phone Manufacturers

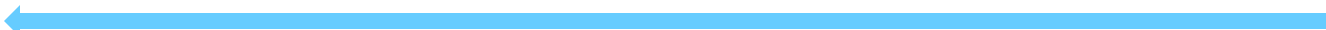
- 4.1 Nokia
- 4.2 Motorola
- 4.3 Samsung
- 4.4 Sony Ericsson
- 4.5 LG
- 4.6 RIM
- 4.7 Apple
- 4.8 HTC
- 4.9 Tianyu (K-Touch)
- 4.10 Huawei
- 4.11 ZTE

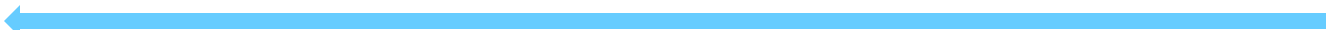
5. Baseband Manufacturers

- 5.1 MTK
 - 5.1.1 ADI Product Line
- 5.2 TI
- 5.3 Marvell
- 5.4 Qualcomm
- 5.5 Broadcom
- 5.6 Infineon
- 5.7 Spreadtrum
- 5.8 ST-Ericsson
- 5.9 MStar
- 5.10 Freescale
- 5.11 VIA Telecom

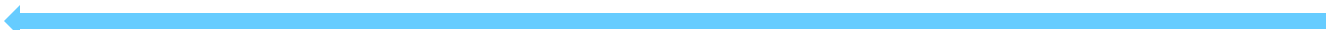
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- Global Mobile Phone Shipment, 2007-2014
 - Global Mobile Phone Shipment and Annual Growth Rate, 2007Q1-2010Q3
 - Global Mobile Phone Shipment by Region, 2007Q1-2010Q2
 - Global Mobile Phone Shipment by Technology, 2007Q1-2010Q2
 - Global CDMA/WCDMA Mobile Phone Shipment by Region, 2006-2011
 - Current Typical Top-class Mobile Phone Kernel
 - ARM Kernel Roadmap
 - Cortex-A9 Kernel
 - ST-Ericsson U8500 System
 - Cortex A5 Block Diagram
 - ARM Mali Graphics Structure
 - Typical Mobile Phones with PowerVR
 - Market Shares of Global Key Baseband Manufacturers by Shipment, 2009
 - Market Shares of Global Key Baseband Manufacturers by Revenue, 2009
 - Market Shares of Global Key Baseband Manufacturers by Shipment, 2010
 - Market Shares of Global Key Baseband Manufacturers by Revenue, 2010
 - Nokia Mobile Phone Shipment and Average Price, 2008Q1-2010Q3
 - Nokia Mobile Phone Shipment and Operating Profit Margin, 2008Q1-2010Q3
 - Nokia Mobile Phone Shipment by Region, 2008Q1-2010Q3
 - Nokia Mobile Phone Sales by Region, 2010Q1-2010Q3
 - Nokia Smart Phone Sales, 2009Q3-2010Q3
 - Suppliers and Proportion of Nokia Mobile Phone Baseband, 2010
 - Motorola Mobile Phone Sales and Operating Profit Margin, 2008Q1-2010Q3
 - Motorola Mobile Phone Shipment and Average Price, 2008Q1-2010Q3
 - Motorola Mobile Phone Sales by Region, 2010Q3

- 
- Suppliers and Proportion of Motorola Mobile Phone Baseband, 2010
 - Samsung Mobile Phone Shipment, 2001-2010
 - Samsung Mobile Phone Average Selling Price and Operating Profit Margin, 2008Q1-2010Q3
 - Suppliers and Proportion of Samsung Mobile Phone Baseband, 2010
 - Sony Ericsson Mobile Phone Shipment & Average Selling Price, 2008Q1-2010Q3
 - Sony Ericsson Mobile Phone Sales & Operating Profit Margin, 2008Q1-2010Q3
 - Sony Ericsson Mobile Phone Sales & Gross Margin, 2009Q3-2010Q3
 - Suppliers and Proportion of Sony Ericsson Mobile Phone Baseband, 2010
 - LG Mobile Phone Sales and Operating Profit Margin, 2008Q1-2010Q3
 - LG Mobile Phone Sales and Shipment, 2008Q1-2010Q3
 - LG Mobile Phone Shipment by Region, 2008Q1-2010Q3
 - Suppliers and Proportion of LG Mobile Phone Baseband, 2010
 - RIM Revenue, Gross Margin & Operating Margin, FY2004-FY2010
 - RIM Revenue by Business, FY2005-FY2010
 - RIM Quartely Shipment and Growth Rate, 2007Q1-2010Q3
 - Suppliers and Proportion of RIM Mobile Phone Baseband
 - Apple Revenue and Net Profit Margin, FY2003-FY2010
 - iPhone Shipment, 2007Q1-2010Q3
 - HTC Revenue & Gross Profit Margin, 2003-2011
 - HTC Shipment, 2004-2011
 - Suppliers and Proportion of K-Touch Mobile Phone Baseband, 2010
 - Suppliers and Proportion of Huawei Mobile Phone Baseband, 2010
 - MTK Revenue & Gross Profit Margin, 2001-2010
 - MTK Handset Chipset Shipment, 2006-2011E
 - MTK Product Roadmap

- 
- MT6229 Block Diagram
 - MT6253 Block Diagram
 - ADI TD-SCDMA Roadmap
 - ADI TD-SCDMA Block Diagram
 - AD6905 Block Diagram
 - TI Revenue by Product, 2007-2010Q1-Q3
 - TI Operating Profit by Product, 2007-2010Q1-Q3
 - Revenue of TI Wireless Division by Product, 2008Q1-2010Q3
 - TI OMAP Roadmap
 - OMAP 4 Series
 - OMAP44X Block Diagram
 - OMAP44X Typical Application
 - OMAP44X Software Structure
 - Block Diagram of TWL6030 Power Management and TWL6040 Audio Back-end Processing Coupled with OMAP44X
 - Marvell Revenue & Operating Profit Margin, FY2001-FY2011Q1-Q3
 - PXA910/920 Block Diagram
 - Qualcomm Revenue & Gross Profit Margin, FY2000-FY2010
 - QCT Revenue and EBT Rate, 2008Q1-2010Q3
 - Qualcomm MSM Chipset Shipment, 2007Q1-2010Q2
 - Clients of Qualcomm, 2010
 - Qualcomm MSM Series Chip Roadmap
 - Qualcomm MDM Series Chip Roadmap
 - Qualcomm QSC Series Chip Roadmap
 - MSM7200A Internal Structure
 - Broadcom Revenue by Division, 2007-2009

- 
- BCM2124 Block Diagram
 - BCM21331 Block Diagram
 - BCM2133 Block Diagram
 - BCM2152 Block Diagram
 - BCM21551 Block Diagram
 - BCM2153 Block Diagram
 - Revenue and Operating Margin of Infineon Wireless Division, FY2008 Q1- FY2010 Q3
 - Infineon Mobile Phone Roadmap
 - XMM6130 System Framework
 - Spreadtrum Revenue & Operating Profit, 2004-2010
 - Spreadtrum Revenue & Gross Profit Margin, 2008Q1-2010Q3
 - Spreadtrum EDGE Baseband Product Plan
 - Spreadtrum 3G Baseband Roadmap
 - Spreadtrum SC6600V CMMB Mobile Phone TV Solution
 - Spreadtrum TV Multimedia Solution Development Roadmap
 - Spreadtrum Products
 - SC8800S Typical Application
 - QS3000 Block Diagram
 - ST-Ericsson Revenue & Operating Profit, 2008Q1-2010Q3
 - ST-Ericsson Roadmap
 - U8500 System Framework
 - U335 System Framework
 - U365 System Framework
 - U330 System Framework
 - 6710 System Framework

- 
- T7211 System Framework
 - PNX6529 System Framework
 - PNX6710 System Framework
 - PNX6517 System Framework
 - MStar Revenue & Operating Profit Margin, 2007-2011
 - MStar Revenue by Product, 2010Q1-Q3
 - MStar Revenue by Client, 2010
 - MStar Worldwide Distribution
 - MStar Human Resource Distribution
 - MStar Employee Distribution by Education Background
 - Freescale Revenue by Product, 2006-2010Q3
 - Shipments of Major Mobile Phone Brands in the World, 2010Q1-Q3
 - Market Shares of Major Mobile Phone Brands in the World by Revenue, 2009Q1-2010Q3
 - Global Shipment of Smart Phone Operating System, 2010Q3
 - BlackBerry Bold Parts & Suppliers
 - BlackBerry Storm Parts & Suppliers
 - HTC Touch Parts & Suppliers (CDMA)
 - Sony Ericsson XPERIA X1 Parts & Suppliers
 - T-Mobile T1 Parts & Suppliers
 - MOTO Krave ZN4 Parts & Suppliers
 - Cortex A5 Performance
 - Nokia Smart Phone Shipment, 2010Q2-Q3
 - Baseband Models and Suppliers of 36 Nokia Mobile Phones, 2010
 - Baseband Models and Suppliers of 25 Motorola Mobile Phones, 2010

- 
- Samsung Mobile Phone Shipment, 2008Q1-2010Q3
 - Baseband Models and Suppliers of 46 Samsung Mobile Phones, 2010
 - Sony Ericsson Mobile Phone Platforms
 - Baseband Models and Suppliers of 39 LG Mobile Phones, 2010
 - Baseband Models of 20 RIM Mobile Phones
 - Baseband Models and Suppliers of 47 K-Touch Mobile Phones, 2010
 - Baseband Models and Suppliers of 55 Huawei Mobile Phones, 2010
 - Baseband Models and Suppliers of 44 ZTE Mobile Phones, 2010
 - Mobile Phones with OMAP3430
 - Marvell ARMAD Series
 - Seven Subsidiaries of Qualcomm
 - Financial Performance of Major Subsidiaries of Qualcomm, 2008-2010
 - Qualcomm Chip Shipment and Market Shares, 2002-2010
 - Characteristics Comparison among QSD8250/QSD8650/MSM8255/MSM8655/MSM8260/MSM8660/QSD8272/QSD8672
 - Brief Introduction to MSM6245/MSM6246/QSC6240
 - Brief Introduction to MSM6260/QSC6270/MSM6280
 - Brief Introduction to MSM62990/QSC6295
 - Brief Introduction to MSM7200A/MSM7225/MSM7227
 - Brief Introduction to MSM7230/QSD8250/MSM8255/MSM8260
 - Brief Introduction to QSD8250A/QSD8672
 - Broadcom M&A Overview
 - Broadcom Mobile Phone Products
 - Infineon Baseband Products
 - Spreadtrum Mobile Phone Baseband Chip Shipment, 2005-2010
 - Freescale Mobile Phone Revenue, 2007Q1-2010Q3

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