



Global and China Micro Electric-Voice Device Industry Report, 2010-2011

Feb. 2011

This report

- ◆ **Analyzes the status quo and development of electric-voice devices of mobile phone and notebook computer.**
- ◆ **Focuses on the market segments of mobile phone , notebook computer and micro electric-voice.**
- ◆ **Highlights the operation and development of major manufacturers of micro electric-voice devices in worldwide and China.**

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Abstract

The report mainly resolves around electric-voice devices of mobile phone and notebook computer.

Foster, the world's largest manufacturer of speaker unit, is involved in large-diameter cone speaker, but it ranks the second in mobile phone and notebook computer field.

Ranking of Major Micro Electric Voice Manufacturers by Revenue, 2010

	Revenue (US\$ mln)
Foster	741
Plantronics	650
AAC	440
NXP Sound Solutions (acquired by Dover)	330
GoerTek	294
Hosiden	262
Merry	251
Panasonic Electronic Devices	210
Creysn	200
Bujeon	156
Sonion	133
Knowles	125
Fortune Grand Enterprise (Forgrand)	108
STAR MICRONICS	51
Zhejiang New Jialian Electronics	25
BSE	14

Such momentous occasions as call center, air traffic control, 911 missions, and stock exchange all employ the office phone headsets of Plantronics which is the world's No.1 manufacturer of office phone headsets and also provides civil Bluetooth headsets, yet most of which are OEMed by China's GoerTek.

As the overlord in mobile phone electric voice field, AAC, Nokia's and Apple's favorite, is in possession of the most complete product lines and technologies. At the end of 2010, Knowles Electronics under Dover Corporation invested

US\$855 million to obtain the sound solutions business of NXP Semiconductors' Standard Products Division. NXP Semiconductors whose sound solutions business began in 1929 is the pioneer expert of micro electroacoustics and dominates mobile phone speaker/receiver field, nevertheless, NXP Semiconductors has devoted itself to mixed signal business and divested itself of the non-core businesses.

A great number of electric voice manufacturers are gathered at Weifang, Shandong Province, China, of which, GoerTek, the largest one, possesses the best capability of rapid die sinking within the industry and has vigorously expanded LED and 3D glasses fields from which the company has made remarkable achievements in recent years.

Hosiden, the time-honored Japanese enterprise, has suffered sharp declines in both performance and competitiveness. Electric voice business is not the core business of the company, so its

market shares are mostly snatched by AAC, GoerTek, and Merry.

Merry, the largest electric voice enterprise in Taiwan, gives priority to hands-free receivers which make it the biggest supplier of Nokia, Sony Ericsson, and Motorola.

Panasonic Electronic Devices Co., Ltd. mainly produces speakers. Creysn, the earphone giant, is the major supplier of Apple iPod, iTouch, and iPhone, and also has its own brand earphones. Bujeon is the core supplier of Samsung mobile phone electric voice and the revenue from Samsung contributes 70%.

On February 28, 2008, Sonion was purchased by Technitrol and operated in the electronic components division named Pulse which was later acquired by Altor Fund in July 2009.

In 2005, Plantronics purchased Altec Lansing, the big manufacturer of notebook computer speaker with a history of over 70 years, for US\$166 million; while at the end of 2010, it sold the ever loss-making Altec Lansing to a fund company at a bargain of US\$16 million.

Knowles supplies 80% of MEMS microphones worldwide and no one can shake its dominating position in the short run despite the failure in the lawsuit against ADI. Although it is an unknown small enterprise, Fortune Grand Enterprise Co., Ltd. (Forgrand) is the global largest manufacturer of notebook computer speaker with the market share of 50%.

A big electric voice factory as usual needs a staff of 8,000 to 10,000, thus with low automation particularly in the inspection. China is the place optimal for electric voice enterprises to

survive, while Japan, Europe and America have no competitiveness at all. Electric-voice devices, the non-core components of mobile phone and notebook computer, are often confronted with rollback from brand vendors. Consequently, the sales price of electric-voice devices keeps falling year after year, the manufacturers make meager profit and they have to actively exploit non mobile phone and notebook computer fields, including vibrating motor, LED, 3D glasses, and large-diameter speaker.

1 Profile of Mobile Phone Electric-voice Devices

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- 1.2 Speaker
- 1.3 MEMS Microphone
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