



**Global and China Mobile Phone
Manufacture Industry Report, 2010-2011**

Mar. 2011

This report

- ◆ **Analyzes the status quo and development of the global and china's mobile phone industry.**
- ◆ **Highlights operation and development of major mobile phone vendors in worldwide and china.**

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Abstract

The global mobile phone shipment increased substantially in 2010 by 20.8% to 1.425 billion after the recession in the previous year, which was mainly fueled by smart phones whose shipment climbed to 330 million in 2010 from merely 189 million in 2009. While in 2011, the world economy is confronted with great challenges as well as serious inflation; and most enterprises will fail to maintain the significant growth this year since the high cardinal number in 2010. It is expected that the shipment of mobile phones worldwide will witness a slight rise of 5.1% to 1.498 billion in 2011.

APPLE, TCL, and HTC performed amazingly with the growth margins over 100% apiece, yet Motorola and Sony Ericsson experienced sharp declines of more than 20%. LG was in an awkward predicament with the shrunken shipment and the loss since Q2 2010.

Shipment of Major Mobile Phone Manufacturers Worldwide, 2009 vs. 2010

	2009 (mln)	2010 (mln)	Growth Margin
NOKIA	432	453	4.9%
SAMSUNG	227	280	23.3%
LG	117.9	116.7	-1.0%
ZTE	61	65	6.6%
RIM	37.2	48.5	29.3%
APPLE	20.7	47.5	129.5%
SE	57.2	43.1	-24.7%
MOTO	55.1	37.2	-32.5%
TCL	16.2	36.2	123.5%
HUAWEI	24.2	31.6	30.6%
HTC	12.0	24.7	105.8%

Source: ResearchInChina

Throughout 2010, the mobile phone output in China expanded 31% to 1.015 billion, accounting for 71% of the global total shipment; and the export volume registered 758 million in which Guangdong Province held a half or so.

In 2010, the manufacturers whose mobile phone output surpassed 10 million in China covered Nokia, Samsung, FIH, ZTE, BYD Electronic, LG, TCL Mobile, BMC, G'Five, Huawei Device, Beijing Tianyu , CK Telecom, Flextronics Industrial (Zhuhai)., Arima Communications, and Motorola; while the followings with respective output between 5 million and 10 million were Lenovo Mobile, Shenzhen Zhenhua., Malata, Konka Mobile, Longconn Shenzhen, Zhangyang Technolgoy, Z-OBEE, NCBC, Tianhao Electronics, Lianchengwen Technology (Shenzhen), and Huabel Technology.

China's mobile phone industry saw the biggest change in 2010 that the supply chain outsourcing enterprises became

the partners of small & medium-sized mobile phone manufacturers who usually adopted supply chain outsourcing mode for export market. Once the supply chain outsourcing manufacturers accomplish raw material procurement and customs clearance, some of them will assist in product manufacturing. Concerning small enterprises, the raw material purchasing quantity of supply chain outsourcing manufacturers is far larger than that of self procurement, and the price hence can be lowered. Furthermore, small enterprises do not have the right of import & export and they must rely on import and export corporations, while supply chain outsourcing manufacturers are best at customs clearance, which brings along convenience, efficiency, and speed to small enterprises.

The excellent companies in supply chain outsourcing field are centralized in Shenzhen, including CBSCS, EA, First Flag, and ProLto. The mobile phone export volume of CBSCS surpassed 25 million in 2010, and the export value exceeded US\$1.5 billion. Approximately 60 million mobile phones were exported by the above mentioned means in 2010, and it is anticipated that the quantity will be in excess of 100 million in 2011.

The year 2010 witnessed another change, i.e. mobile phone mainboard suppliers transformed into OEMs. MediaTek platform made mobile phone solutions so easy that even a single person could fulfill an entire solution. Such original mobile phone design companies as Longcheer, Shanghai HuaQin, and Wingtech Group were successively turned into mobile phone mainboard providers. In H2 2009, the mobile phone mainboard suppliers only providing mainboard or complete set could no longer satisfy the demand of customers on account of the competitions among supply chain outsourcing manufacturers.

Consequently, the mobile phone designers again shifted to mobile phone manufacture and the direct export to designated countries where the customers live. Mobile phone mainboard suppliers thus developed into the OEMs. Longcheer has established Shenzhen and Huizhou based Longconn Electronics to produce mobile phones, Shanghai HuaQin. has set up Zhuhai and Dongguan based HuaBel Technology, and Z-OBEE has founded Shenzhen based Tong Qing Communication Technology.

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