



Global and China Mobile Phone & Tablet PC Processor Industry Report, 2010-2011

May 2011

This report

- ◆ **Analyzes the global mobile phone market and global &China tablet PC market.**
- ◆ **Focuses on status quo and future of mobile phone and tablet PC processor.**
- ◆ **Highlights the operation of mobile phone and mobile phone processor manufacturers.**

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Abstract

Mobile phone processor mainly covers baseband processor and application processor, while tablet PC processor mostly refers to GPU. The mobile phone processors are undergoing great changes and the original pattern will witness sharp fluctuations.

TI ranked the first in mobile phone baseband industry for consecutive years in 2G era by virtue of the cooperation with Nokia. However, the great success in 2G era has resulted in the comparatively late startup of TI in 3G era and TI has been surpassed by Qualcomm. TI holds the view that it is the analog and DSP instead of mobile phone baseband that compose the core businesses. Mobile phone baseband sector features huge and continuous investment, usually several hundred millions of US dollars per annum; the life cycle of analog device could be more than 30 years, and the input-output ratio is far higher than that of mobile phone baseband sector. As early as 2009, TI announced to end the mobile phone baseband business in 2012.

Nokia, the sole mobile phone manufacturer participating in mobile phone baseband design, has found the new partner-Renesas. In July 2010, Nokia transferred its baseband design team to Renesas for US\$200 million, which indicated that a majority of Nokia basebands in 4G era would be supplied by Renesas.

Renesas boasts excellent RF technology and multimedia processing technology. In February 2011, Renesas launched SP2531, the 4G triple-mode baseband processor, and the application processor based MP5225. As a matter of fact, MP5225 is the combination of SP2531 and SH-Mobile APE5R. Renesas has claimed to be the global No.1 vendor in mobile phone baseband in 2015, which might come true if Nokia remains in the first position worldwide in 2015.

In August 2010, Intel purchased the Wireless Division of Infineon for US\$1.4 billion so as to obtain the 4G baseband and RF technology; together with the GPU centering on ATOM, Intel can make the core processors of smart phones and hence compete with Qualcomm. Engaged in GPU sector for years, Intel enjoys outstanding experience and technologies and it is the biggest shareholder of Imagination Technologies.

The GPU IP core of Imagination Technologies is PowerVR series which are employed in any generation iPhones and iPads. Moreover, the OMAPs after 3 series of TI, APE5R of Renesas, and NGP of Sony all use PowerVR as GPU IP core.

On May 9, 2011, NVIDIA declared to acquire Icera, the developer of baseband chips, for US\$367 million. In the future, NVIDIA will share the similar development strategy with Intel to integrate the baseband chips in Tegra processor, enhance the competitiveness in smart phone market, and help the mobile phone/tablet PC manufacturers to reduce R&D difficulties and manufacturing cost.

Broadcom will be the dark horse in 2011. The mainstream high-end mobile models like E7, X7, C6, C7, and N8 of Nokia released at the end of 2010 have adopted Broadcom's BCM2727 as GPU, yet no one had showed interest in the application processors of Broadcom before. Nokia has abandoned the OMAP series application processors of TI simply in that OMAP is priced approximately US\$16-24, almost a double of that of BCM2727.

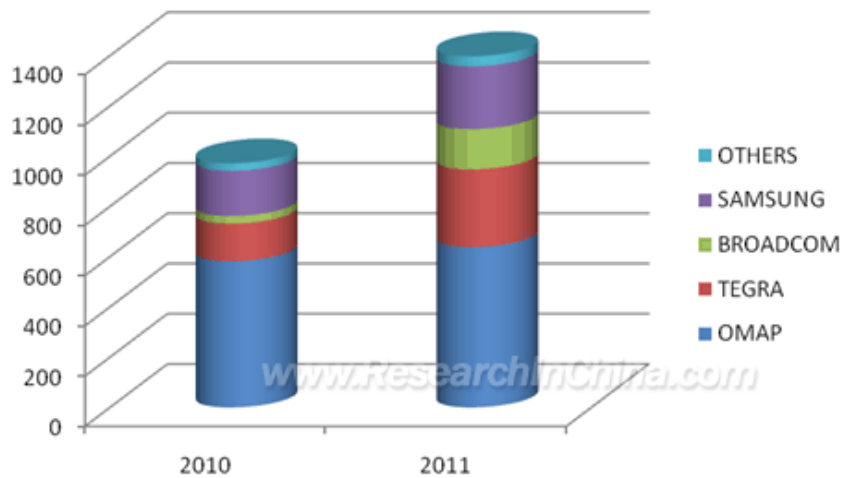
Besides the application processor, the baseband of Broadcom has won the good graces of Nokia and Samsung. Nokia's X2-01/02/03, C3-00, 2710C, and 7020 have applied BCM21251, and Samsung's GT-S series models have adopted Broadcom baseband. The revenue from mobile phone sector of Broadcom in 2011 will be several folds of that in 2010. Broadcom is the only company that wins the lawsuit against Qualcomm, the adoption of its products therefore means the minimum patent controversy.

OMAP of TI is positioned as top-grade product with very high price. Nevertheless, merely Motorola vigorously supports the OMAP series, Apple and Samsung possess their own application processors and they do not use OMAP, while LG adopts small quantities of OMAP and it prefers TEGRA of NVIDIA.

MTK, Spreadtrum, and MStar keep involved in the fierce competition of 2G market which is shrinking. The sales volume of mobile phones in the emerging markets of India, North Africa, the Middle East, and South America is inferior to that in 2010, and Shenzhen takes severe measures against illegal mobile phones.

As for tablet PC field, thanks to the incomparable brand charisma and supply chain integration capability, the dominating Apple has put its rivals in constant complaints.

Revenue of Major Application Processor Manufacturers Worldwide, 2010-2011



Source: ResearchInChina

Remark: excluding Apple whose application processors are not for sale

1 Global Mobile Phone Market

- 1.1 Market Size
- 1.2 Market Share of Mobile Phone Manufacturers
- 1.3 Smartphone Market and Industry
- 1.4 Chinese Mobile Phone Industry

2 Global and China Tablet PC Market

- 2.1 Global Tablet PC Market Size
- 2.2 Chinese Tablet PC Market
 - 2.2.1 Price
 - 2.2.2 OS and Hardware

3 Status Quo and Future of Mobile Phone and Tablet PC Processor

- 3.1 Development Orientation of ARM Core
- 3.2 4G Baseband Core
- 3.3 Application Processor Core
- 3.4 Mobile Phone GPU
 - 3.4.1 Arm Mali
 - 3.4.2 Imagination PowerVR
 - 3.4.3 Qualcomm Adreno
- 3.5 Mobile Phone Processor Comparison, 2011 vs. 2012
- 3.6 Market Share of Mobile Phone Processor Manufacturers
- 3.7 Status Quo of Tablet PC Processor

4 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 ZTE
- 4.10 Huawei
- 4.11 Tianyu

5 Manufacturers of Mobile Phone Processor

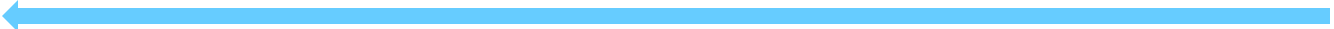
- 5.1 MTK
 - 5.1.1 ADI Product Line
- 5.2 TI
- 5.3 Marvell
- 5.4 Qualcomm
- 5.5 Renesas
- 5.6 NVIDIA
- 5.7 Broadcom
- 5.8 ST-Ericsson
- 5.9 Freescale
- 5.10 Spreadtrum
- 5.11 Infineon
- 5.12 Samsung
- 5.13 Telechips
- 5.14 Rockchips
- 5.15 MStar

- Shipment of Mobile Phone Worldwide, 2007-2014E
- Quarterly Shipment and Annual Growth Margin of Mobile Phone Worldwide, 2008Q1-2011Q1
- CDMA/WCDMA Mobile Phone Shipment Worldwide, 2007-2011
- Shipment of Mobile Phone Worldwide by Band, 2009-2010
- Operating Margin of Top Five Mobile Phone Manufacturers Worldwide, 2009Q1-2010Q4
- Market Share of Major Smartphone Manufacturers Worldwide, 2011Q1
- Market Share of Smartphone Operating Systems Worldwide, 2009-2012E
- Smartphone Shipment of Major Mobile Phone Manufacturers Worldwide, 2010-2011
- Export Volume and Growth Margin of China Mobile Phones, 2000-2010
- Export Value and Growth Margin of China Mobile Phones, 2002-2010
- Export Volume and ASP of China Mobile Phones, 2002-2010
- Mobile Phone Output in China by Region, 2010
- Shipment of NETBOOK, iPad and Tablet PC, 2008-2012E
- Shipment of Tablet PC Worldwide by Brand, 2011-2012E
- Typical Top-grade Mobile Phone Cores
- ARM Core Roadmap
- 4G Baseband Processing Performance Requirement
- Illustrative Baseband Architecture
- Cortex-A9 Block Diagram
- Cortex-A5 Block Diagram
- Cortex-A15 Block Diagram
- Market Share of Major Mobile Phone Baseband Manufacturers (by Shipment), 2010
- Market Share of Major Mobile Phone Baseband Manufacturers (by Revenue), 2010
- Market Share of Major Mobile Phone Baseband (2G) Manufacturers (by Shipment), 2010
- Market Share of Major Mobile Phone Baseband (3G) Manufacturers (by Shipment), 2010

- Market Share of Major Mobile Phone Baseband Manufacturers (by Shipment), 2011
- Revenue of Major Application Processor Manufacturers Worldwide, 2010-2011
- Market Share of Tablet PC Processor Manufacturers, 2011
- Supply Relationship of Tablet PC Processors, 2011
- Sales Volume and Operating Margin of NOKIA Mobile Phone, 2008Q1-2011Q1
- Sales Volume of NOKIA Ordinary Mobile Phone and Smartphone, 2009Q3-2011Q1
- Sales of NOKIA Ordinary Mobile Phone and Smartphone, 2009Q3-2010Q4
- Shipment of NOKIA Mobile Phone by Region, 2008Q1-2011Q1
- Revenue of NOKIA Mobile Phone by Region, 2009Q1-2011Q1
- Shipment and Average Price of NOKIA Mobile Phone, 2008Q1-2011Q1
- Output of NOKIA Mobile Phone by Region, 2010
- Supply Ratio of NOKIA Mobile Phone Baseband Suppliers, 2010
- Sales and Operating Margin of MOTOROLA Mobile Phone Business, 2008Q1-2011Q1
- Shipment and Operating Margin of MOTOROLA Mobile Phone, 2008Q1-2011Q1
- Shipment and Average Price of MOTOROLA Mobile Phone, 2008Q1-2011Q1
- Shipment of MOTOROLA Mobile Phone by Region, 2010
- Revenue of MOTOROLA Mobile Phone Business by Region, 2010Q4-2011Q1
- Supply Ratio of MOTOROLA Mobile Phone Baseband Suppliers, 2010
- Shipment and Annual Growth Margin of SAMSUNG Mobile Phone, 2001-2010
- Shipment and Operating Margin of SAMSUNG Mobile Phone, 2008Q1-2011Q1
- ASP and Shipment of SAMSUNG Mobile Phone, 2008Q1-2011Q1
- Output of SAMSUNG Mobile Phone by Region, 2010
- Supply Ratio of SAMSUNG Mobile Phone Baseband Suppliers, 2010
- Shipment and Average Price of Sony Ericsson Mobile Phone, 2008Q1-2011Q1
- Sales and Operating Margin of Sony Ericsson Mobile Phone Business, 2008Q1-2011Q1

- Shipment and Gross Margin of Sony Ericsson Mobile Phone, 2009Q3-2011Q1
- Supply Ratio of Sony Ericsson Mobile Phone Baseband Suppliers, 2010
- Output of Sony Ericsson Mobile Phone by Plant, 2010
- Shipment and Annual Growth Margin of LG Mobile Phone, 2002-2010
- Sales and Operating Margin of LG Mobile Phone Business, 2008Q1-2011Q1
- Shipment and Operating Margin of LG Mobile Phone, 2008Q1-2011Q1
- Shipment of LG Mobile Phone by Region, 2010Q4-2011Q1
- Supply Ratio of LG Mobile Phone Baseband Suppliers, 2010
- Output of LG Mobile Phone by Region, 2010
- Revenue, Gross Margin and Operating Margin of RIM, FY2004-FY2011Q3
- Revenue of RIM by Sector, FY2005-FY2011Q3
- Shipment of RIM Mobile Phone, FY2005-FY2011
- Shipment of RIM Mobile Phone, FY2009Q4-FY2011Q3
- RIM Revenue by Region, FY2010
- OEM Ratio of RIM's OEM Factories, 2010
- Revenue and Net Profit Margin of APPLE, FY2004-FY2010
- Revenue of APPLE by Region, FY2004-FY2010
- Revenue of APPLE by Product, FY2004-FY2010
- Revenue and Gross Margin of HTC, 2003-2011
- Shipment and Average Price of HTC, 2004-2011
- Shipment and ASP of HTC, 2008Q1-2010Q4
- Revenue and Net Profit Margin of HTC, 2008Q1-2010Q4
- Revenue of HTC by Region, 2006-2010
- Shipment and ASP of ZTE, 2006-2010
- Revenue and Gross Margin of ZTE, 2006-2010

- Supply Ratio of ZTE Mobile Phone Baseband Suppliers, 2010
- Shipment and Growth Margin of HUAWEI Mobile Phone, 2006-2011
- Supply Ratio of HUAWEI Mobile Phone Baseband Suppliers, 2010
- Supply Ratio of K-TOUCH Mobile Phone Baseband Suppliers, 2010
- Revenue and Gross Margin of MTK, 2001-2011
- Shipment of MTK Mobile Phone Sets Piece, 2006-2011
- Revenue of MTK by Product, 2006-2010
- Product Roadmap of MTK
- Internal Frame-chart of MT6253
- TD-SCDMA Roadmap of ADI
- System Frame-chart of ADI TD-SCDMA
- Internal Frame-chart of AD6905
- Revenue of TI by Product, 2007-2010
- Operating Profit of TI by Product, 2007-2010
- Revenue of TI by Region, 2008-2010
- Revenue of TI Wireless Sector by Product, 2008Q1-2010
- Products with OMAP3610/20/30 and OMAP4430
- Block Diagram of OMAP44X
- Typical Applications of OMAP44X
- Block Diagram of OMAP5430
- Revenue and Operating Margin of MARVELL, FY2003-FY2011
- Marvell ARMAD Series Products
- Block Diagram of PXA168
- Block Diagram of PXA910/920
- Revenue and Gross Margin of Qualcomm, FY2000-FY2010

- 
- Revenue of Qualcomm by Region, FY2006-FY2010
 - Revenue and EBT Margin of Qualcomm CDMA Technologies, 2008Q1-2011Q1
 - Shipment of Qualcomm MSM Chip Sets, 2007Q1-2011Q1
 - Shipment and Market Share of Qualcomm Chips, 2002-2010
 - Clients of Qualcomm, 2010
 - Roadmap of Qualcomm MSM Series Chips
 - Roadmap of Qualcomm MDM Series Chips
 - Roadmap of Qualcomm QSC Series Chips
 - Internal Structure of MSM7200A
 - Revenue of Renesas's Three Divisions, FY2010-FY2011
 - Renesas Mobile Roadmap
 - Block diagram of Renesas HI-END Mobile Phone
 - Roadmap of Renesas SH-MOBILE
 - Roadmap of EMMA Application Processors
 - Block Diagram of EMMA EV2
 - Block Diagram of Renesas G4
 - Block Diagram of Renesas AG5
 - Revenue and Operating Margin of NVIDIA, FY2005-FY2011
 - Revenue of NVIDIA by Region, FY2008-FY2011
 - Revenue of NVIDIA by Division, FY2008-FY2011
 - Roadmap of TEGRA
 - Products with TEGRA
 - Revenue of Broadcom by Division, 2007-2011Q1
 - Mobile Phones with Broadcom Baseband, 2010-2011
 - Block Diagram of BCM2727

- Revenue and Operating Margin of ST-ERICSSON, 2008Q1-2011Q1
- Revenue and Operating Margin of Freescale, 2003-2010
- Revenue of Freescale by Division, 2006-2010
- Revenue of Freescale Mobile Phone Business, 2007Q1-2011Q1
- Tablet PC/E-reader with IMX51
- Mobile Phone and PMP with IMX51
- Block Diagram of IMX53
- Revenue and Operating Margin of Spreadtrum, 2004-2010
- Revenue and Gross Margin of Spreadtrum, 2008Q1-2010Q3
- Plan of Spreadtrum EDGE Baseband Products
- Roadmap of Spreadtrum 3G Baseband
- SC6600V CMMB Mobile TV Solution of Spreadtrum
- Roadmap of Spreadtrum Multimedia Solutions for Mobile TV
- Products of Spreadtrum
- Typical Applications of SC8800S
- Block Diagram of QS3000
- Revenue and Operating Margin of Infineon (Intel)'s Wireless Business, FY2008Q1-FY2011Q1
- Roadmap of Infineon Mobile Phone
- Technology of Samsung Application Processors
- Roadmap of Samsung Application Processors
- Block Diagram of S5PV310 (EXYNOS4210)
- Global Presence of Telechips
- Revenue and Product Distribution of Telechips, 2001-2007
- Revenue and Operating Margin of Telechips, 2005-2011
- Revenue from Auto Audio Sector of Telechips, 2005-2014E

- Roadmap of Telechips Products
- Revenue and Operating Margin of MStar, 2007-2011
- Revenue of MStar by Product, 2010Q1-Q3
- Revenue of MStar by Client, 2010
- Global Mobile Phone Shipment by Brand, 2010Q1-2011Q1
- Market Share of Major Mobile Phone Brands Worldwide by Revenue, 2009Q1-2010Q3
- Global Smartphone Shipment by Operating System, 2010Q3
- Data Standards of 3G/3.5G/3.9G/4G
- ARM Cortex-A5 Performance
- Comparison among 23 Mobile Phone Processors
- Status Quo of Tablet PC Processor in China
- Baseband Types and Suppliers of 48 Nokia Mobile Phones, 2010-2011
- Baseband Types and Suppliers of 35 Motorola Mobile Phones, 2010-2011
- Baseband Types and Suppliers of 76 Samsung Mobile Phones, 2010-2011
- Mobile Phone Platforms of Sony Ericsson
- Baseband Types and Suppliers of 47 LG Mobile Phones, 2010-2011
- Baseband Types of 20 RIM Mobile Phones
- Sales Volume of iPod/iPad/iPhone, FY2004-FY2011
- Baseband Types and Suppliers of 70 ZTE Mobile Phones, 2010-2011
- Baseband Types and Suppliers of 71 Huawei Mobile Phones, 2010-2011
- Baseband Types and Suppliers of 72 Tianyu Mobile Phones, 2010-2011
- Key features of OMAP4430 & 4460
- Profile of Qualcomm's 7 Branches
- Financial Data of Main Subsidiaries of Qualcomm

- Characteristics Comparison among QSD8250\QSD8650 MSM8255\MSM8655\MSM8260\MSM8660\QSD8272\QSD8672
- Key Features of Renesas AP4
- Key Features of EMMA EV2
- Acquisitions of Broadcom
- Broadcom Mobile Phones
- Parameters of IMX5XX Series
- Shipment of Spreadtrum Mobile Phone Baseband Chips, 2005-2010
- Infineon's Baseband Products
- Mobile Application Processors of Samsung
- Mobile Phones with S5PC110
- Mobile Phones with S5PV310

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