



**Global and China Crystal Oscillator Industry
Report, 2010-2011**

Jun. 2011

This report

- ◆ **Analyzes the smart phone and crystal oscillator market.**
- ◆ **Focuses on the ranking, segmented market shares of crystal oscillator industry.**
- ◆ **Highlights the operation of key manufacturers in crystal oscillator industry.**

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Abstract

Crystal oscillator, which is a must of all the digital circuits, boasts astonishing shipment every year. The shipment approximated 12 billion pieces in 2009 and climbed 25% to 15 billion in 2010. However, the price competition has never ceased, which has resulted in the slight increase of sales. Year 2010 witnessed the highest growth margin of crystal oscillator industry during the recent decade, and the market size reached US\$3.898 billion, up 14.3% from 2009.

CMOS and MEMS crystal oscillators have been researched for years and they feature many advantages, but quartz crystal oscillator still has remained the mainstream for decades. The accumulated shipment of CMOS and MEMS crystal oscillators was smaller than 100 million pieces, shy of 1% of that of quartz crystal oscillator.

As the overlord in crystal oscillator industry, the output value of Japan has accounted for 67% of the global total for more than a decade. Even the appreciation of the yen and the earthquake cannot shake the status and output value of Japanese enterprises in crystal oscillator industry.

Among the ranking of Top 21 crystal oscillator manufacturers worldwide by revenue in 2010, the Japanese enterprises occupied the Top 4 positions, while Taiwanese and American manufacturers held respectively 7 and 4 positions.

In respect of the revenue comparison between 2010 and 2009, manufacturers like Epson Toyocom, Rakon, TXC, HELE, SIWARD, and TAISAW progressed rapidly, yet TEW and Pericom saw the decline. In general, most of the Japanese crystal oscillator enterprises were in stable development, large groups of Taiwanese counterparts in relatively rapid growth, while the majority of American ones in comparatively slow progress or downslide.

Top 21 Crystal Oscillator Manufacturers Worldwide by Revenue, 2010

<i>Manufacturer</i>	<i>Region</i>	<i>Revenue in 2010 (US\$ mln)</i>	<i>Revenue in 2009 (US\$ mln)</i>	<i>Growth Margin</i>
<i>Epson Toyocom</i>	<i>Japan</i>	949	655	44.9%
<i>NDK</i>	<i>Japan</i>	626	597	4.9%
<i>KDS</i>	<i>Japan</i>	415	343	21.0%
<i>Kyocera Kinzaki</i>	<i>Japan</i>	358	317	12.9%
<i>TXC</i>	<i>Taiwan</i>	301	223	35.0%
<i>Vectron</i>	<i>USA</i>	205	202	1.5%
<i>Rakon</i>	<i>New Zealand</i>	180	120	50%
<i>HELE</i>	<i>Taiwan</i>	165	112	47.3%
<i>HOSONIC</i>	<i>Taiwan</i>	109	110	-0.9%
<i>TEW</i>	<i>Japan</i>	66	70	-5.7%
<i>River</i>	<i>Japan</i>	65	55	18.2%
<i>TAITIEN</i>	<i>Taiwan</i>	59	54	9.3%
<i>Pericom</i>	<i>USA</i>	46	53	-13.2%
<i>Micro Crystal</i>	<i>Switzerland</i>	57	50	14%
<i>SIWARD</i>	<i>Taiwan</i>	70	46	52.2%
<i>TAISAW</i>	<i>Taiwan</i>	60	42	42.9%
<i>JINGYUAN YUFENG</i>	<i>Mainland China</i>	50	40	12.5%
<i>EAST CRYSTAL</i>	<i>Mainland China</i>	44	32	37.5%
<i>CONNER-WINFIELD</i>	<i>USA</i>	39	35	11.4%
<i>FOX</i>	<i>USA</i>	38	34	11.8%
<i>AKER</i>	<i>Taiwan</i>	19	14	35.7%

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