



**Global and China Lens Industry  
Report, 2010-2011**

**August 2011**

## ***This report***

- ◆ **Analyzes the status quo of lens industry.**
- ◆ **Focuses on lens market**
- ◆ **Highlights the key lens enterprises.**

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## Abstract

Lens industry originated from Germany. So far, Germany has still been a major origin of high-end lenses. Zeiss and Leica are still the admired manufacturers, but their products rarely involve the field of consumer electronics. Zeiss ever provided designs to Nokia and Sony, but it did not offer lenses because of low profit. Moreover, the capacity of Zeiss is not so considerable. In reality, Zeiss has been focusing on healthcare and semiconductor fields.

In the field of consumer electronics lenses, China, Japan and South Korea are absolutely the major players, especially Japan enjoys overwhelming superiority. Taiwanese companies provide services mainly to Japanese customers, while Japanese companies transfer technologies to Taiwanese peers to resist the competition from South Korea and China. In a sense, Taiwan and Japan are in the same optical alliance.

Lens finds application in three varieties of consumer electronics.

First, mobile phones. Now, the prevalence rate of camera phones exceeds 85%, and the ones with 5-megapixel cameras are the mainstream.

Smart phones and 3G mobile phones often have video call function, so they require two lenses, one for video call and the other for camera. One-third of smart phones boast 8-megapixel cameras. In 2011, the shipment of lenses used in mobile phones will reach 1.343 billion units, much more than that of lenses used in other consumer electronics.

Second, digital still cameras (DSC) and digital video cameras (DV). Japanese companies play a dominant role in these fields. Currently, most of DSCs and mobile phones are equipped with video clip function, beating the DV market. It is expected that, in 2011, the shipment of digital cameras will be 145 million, while that of DV will register 15 million. Low-end digital camera market is squeezed by mobile phone market, so it is in a downturn. High-end SLR (DSLR) market presents robust growth, but it is monopolized by Canon and Nikon with over 80% market shares together.

Third, laptops, tablet PCs and Web cameras. Currently, 65% of laptops are installed with cameras, and it is expected that this proportion will be 75% in 2012. Over 95% of laptops are made by Taiwanese OEMs. Laptops mostly have 0.30-megapixel or 1.30-megapixel cameras, both of their technology and profit margins are at the low level. The cameras used in laptops are generally produced by computer peripheral equipment manufacturers, which mainly produce keyboards, mouse and PC cameras. These manufacturers include LiteOn, Chicony, Darfon, BTC, Genius, Sunrex, etc., of which Chicony ranks first among them.

Revenue of Major Lens Manufacturers in the World, 2009-2011E (USD mln)

Manufacturer	2009	2010	2011E	Remark
Fujinon	863	732	741	Pure optical components manufacturer
Largan	247	390	598	Pure optical components manufacturer
Asia Optical	380	444	487	Optical components revenue
Sunny	168	269	341	Total revenue
KMOT	376	340	310	Optical components revenue
Primier Foshan	280	284	288	Optical components revenue
Tamron	219	258	283	Optical components revenue
GSEO	28	102	268	Pure optical components manufacturer
Phenix Optical	137	216	247	Total revenue
Kinko	116	166	209	Pure optical components manufacturer
Fu Jing Precision Industry Jincheng	37	95	158	Optical components revenue
Kantatsu	150	155	152	Pure optical components manufacturer
Newmax	29	73	93	Pure optical components manufacturer
Sekonix	52	77	78	Total revenue
Kolen	51	75	76	Total revenue
Diostech	50	56	52	Optical components revenue
Excellence Electro-Optical	13	21	30	Pure optical components manufacturer
Glory	17	23	28	Pure optical components manufacturer

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