



**Global and China Digital Still Camera (DSC)
Industry Report, 2011**

Aug. 2011

This report

- ◆ **Analyzes the digital camera industry and market**
- ◆ **Focuses on lens market**
- ◆ **Highlights on the digital camera manufacturers and OEMs, also lens manufacturers, case and structure manufacturers**

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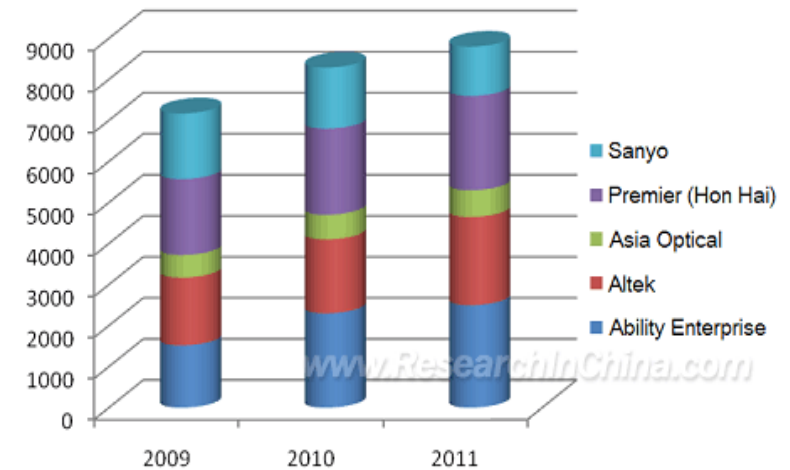
Abstract

The global digital camera shipment was about 141 million units in 2010, and it is expected to reach 145 million units in 2011. As the pixels of camera phone continue to climb, mainstream products have armed 5 megapixels; affected by camera phones, the medium and low-end digital camera market has stagnated. At present, DSLR (Digital, Single, Lens, Reflex) and EVIL (Electronic Viewfinder Interchangeable Lens) cameras enjoy good prospect. In DSLR field, Canon and Nikon hold 75% market shares totally, Sony 15%, while other peers take tiny shares. It is hard to enter the optics field, and the dominance of two giants Canon and Nikon will remain unchanged in the next few years. In EVIL field, Sony and Panasonic occupy 70% market shares altogether, but the strength of Canon and Nikon should not be ignored.

China is the world's largest producer of digital cameras. It exported 109 million digital cameras and achieved USD7.07 billion in 2010, up 12%. In Q1 2011, the export and import value of digital cameras reached USD1.904 billion, including the import value of USD569 million and the export value of USD1.335 billion; and 20.11 million digital cameras were exported.

Japanese companies boast over 80% shares in the global digital camera market. Most Japanese enterprises produce high-end products locally in Japan, medium and low-end products in China, and a small amount of products in Southeast Asia, It is expected that the shipment of the global digital camera OEMs will be approximately 88.28 million units in 2011.

Shipment of Major Digital Camera OEMs in the World, 2009-2011



Canon produces all of its own products by itself. It produces DSLR cameras in Japan, most of card type digital camera in Zhuhai (China), a small amount of big zoom cameras in Malaysia or Thailand, and lenses in Taichung (Taiwan) and Zhuhai.

Nikon outsources about 50% of its products to OEMs. Its high-end products are produced locally in Japan, medium and low-end products in Wuxi (Jiangsu), some parts in Hangzhou and Guangzhou, and most of big zoom cameras in Indonesia.

Although it is similar with Nikon, Fujifilm entrusts OEMs to produce more products than the Nikon. Fuji's own production base is located in Suzhou city, with Altek and Asia Optical as its major OEMs.

KODAK outsources all its products to OEMs. Altek is its major OEM.

About 50% of Olympus' products are made by OEMs, such as Hon Hai and Sanyo. Now, Sony mainly cooperates with Hon Hai instead of the previous Sanyo.

After Sanyo is acquired by Panasonic, digital camera manufacturers cut orders for Sanyo, because Panasonic also produce a large number of digital cameras. Panasonic intends to reduce low-profit OEM business, and Sanyo will retreat from digital camera OEM field in the future.

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