



# China Mobile Communication Antenna Industry Report, 2011

Oct. 2011

## ***This report***

- ◆ **Illustrates mobile communication antenna market and segment**
- ◆ **Analyzes the international and local mobile communication antenna manufacturers**

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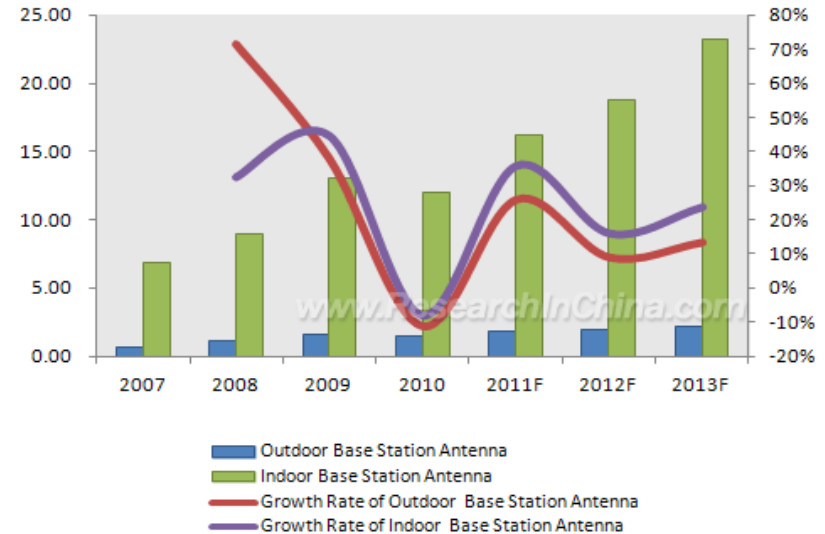
## Abstract

At the end of 2010, mobile phone users amounted to 859 million and 3G subscribers totaled 47.1 million in China. In July 2011, mobile phone users jumped to 930 million, including 87.2 million 3G subscribers.

The booming of mobile subscribers and communication data traffic promote telecom operators to continually optimize and expand their networks.

In 2011, China's market capacity of outdoor base station antenna grew 26% YoY to approximately 1.78 million units; and that of indoor base station antenna approximated 16.2 million units, up 35% YoY. China's outdoor base station antenna market witnesses cutting-throat competition and the product price slipped sharply as well. Domestic base station antenna manufacturers account for more than 85% of the market share in China.

**Market Capacity and Growth Rate of Base Station Antenna in China, 2007-2013 (Unit: mln sets)**



**Source: ResearchInChina**

In 2008, microwave communication system (MCS) was adopted in China's communication transmission. In 3G network construction, Chinese telecom operators increased the procurement of MCS. In 2010, the market capacity of microwave antenna in China hit 190,000 units and rose to over 340,000 units in 2011. Four domestic manufacturers capable of producing high-performance microwave antenna are Xi'an Putian, Shenglu Telecommunication, Mobi Development and Guangdong Tongyu.

Benefiting from the development of such mobile terminals as smart phones, tablet PCs and laptops, the market capacity of mobile communication terminal antenna reached 1.08 billion in China in 2010. In the next three years, the average growth rate of the market capacity will be likely to maintain above 15%. Major local mobile terminal antenna providers include Shenzhen Sunway Communication, Shenzhen Speed, Shanghai Jersoncom and Kunshan Auden.

Shenglu Telecommunication (002446.SZ) is committed to producing all types of antenna products for base stations and terminals, as well as microwave antenna products with frequency range from 6GHz to 40GHz, and ranks as the most competitive manufacturer of mobile communication antenna of China. In H1 2011, affected by the factors like the slow investment progress of Chinese operators, the sales growth of Shenglu Telecommunication's products slowed down. The revenue of base station antenna fell 4.4%, and that of Yagi Antenna dropped 17.4%, while the growth rate of the promising microwave antenna and indoor terminal antenna only touched 5.2% and 6.8% respectively.

More than 30% of revenue of Mobi Development (0947.HK) comes from ZTE. In H1 2011, Mobi Development achieved sales of RMB 124.5 million from antenna business, down 5.9%, of which the sales of multi-frequency/multi-system antenna business reached RMB 29.36 million, up 192.3% over the same period in 2010 which was mainly fueled by the substantial growth of overseas demand.

Xi'an Haitian Antenna (08227.HK) and Sunnada jointly established a new company in Aug. 2011 which engages in the R&D, manufacturing and sales of mobile communication antenna. In H1 2011, Haitian Antenna realized revenue of RMB 27.24 million, up 39% YoY and with loss decreasing to RMB 14.215 million.

Sunway Communication is the sole listed Chinese enterprise specializing in producing mobile terminal antenna. The company occupies about 1.3% of the global mobile terminal antenna market and around 20% of the domestic market. In H1 2011, the company's revenue grew only 10.5% to RMB 72.52 million, while its consolidated gross margin rose to 59%, which could be attributed to the spin-off of its low-gross-margin products and customers.

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