



**Global and China Micro Electronic-Acoustic
Device Industry Report, 2011-2012**

Feb. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include NBS(National Bureau of Statistics of China), Wind, and Ministry of Industry and Information Technology of the P.R. China etc .

Abstract

In 2011, the micro electronic-acoustic device industry sustained its brisk development of a year before, with the giants growing ever stronger. The homegrown manufacturers in China continued growing by leaps and bounds, while Japanese counterparts were declining.

But it was not the case for Japan-based Foster, which had transferred most of its production bases to Mainland China and Viet Nam, and established plants in Chongzuo of Guangxi, Gaozhou and Heyuan of Guangdong, Changzhou of Jiangsu, Yunfu of Guangzhou and Nanning of Guangxi, where feature labor-intensive with low labor cost. Moreover, with over 60 years of experience in speaker sector, Foster safely consolidates its leadership in the world.

ACC was favored by its big customer Apple, keeping growth in performance and the highest profitability inside the industry. GoerTek endeavors to explore non-acoustics field, and its revenue in 2011 nearly doubled the figure in 2010.

Merry made more projections into high-power speaker for Notebook computer, and it was just certified by Apple Notebook. Bluecom greatly developed linear vibration motor and has been certified by Apple.

Micro Electronic-Acoustic Device Manufacturers by Revenue, 2010-2011

	Operating Margin, 2010	Revenue in 2010 (\$ mln)	Operating Margin in 2011	Revenue in 2011 (\$ mln)
Merry	9.6%	251	2.9%	271
Goertek	13.3%	294 (Revenue from Single Audio Products)	15.0%	508
AAC	29.5% (Net Profit Margin)	440	26.1% (Net Profit Margin)	648
Hosiden	1.6%	269 (Revenue from Single Audio Products)	-1.1%	198 (Revenue from Single Audio Products)
Foster	7.5%	864 (excluding revenue from in-car loudspeaker)	1.1%	1106 (excluding revenue from in-car loudspeaker)
BSE	28.6%	125	-2.1%	109
Plantronics	20.6%	684 (Total Revenue)	22.8	714 (Total Revenue)
Knowles		125		165
Dover		330		300
Fortune Grand Technology		108		116
Panasonic Electronic Devices		210		208
Sonion		113		133
Newjialian	0.8%	54	-4.0%	58
STAR MICRONICS		51		30
Bujeon		156		208
Crysn		173		200

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1. Profile of Mobile Phone Acoustic Components

- 1.1 Receiver
- 1.2 Speaker
- 1.3 Micro MIC
- 1.4 MEMS MIC
- 1.5 MEMS MIC Market and Industry
- 1.6 Micro Speaker

2. Mobile Phone Market

- 2.1 Global Market Size
- 2.2 Market Share of Mobile Phone Vendors
- 2.3 Smartphone Market

3. Notebook Computer Market

- 3.1 Global Market Size and Brand Layout
- 3.2 Tablet PC Market
- 3.3 Notebook Computer ODM Industry

4. Micro Electronic-Acoustic Component Industry

- 4.1 Ranking
- 4.2 Market Share of Mobile Phone Micro Electronic-Acoustic Component Vendors
- 4.3 Supply Relations between Micro Electronic-Acoustic Component Vendors and Mobile Phone Manufacturers
- 4.4 Notebook Speaker

5. Micro Electronic-Acoustics Device Manufacturers


- 5.1 Merry
- 5.2 Goertek
- 5.3 AAC
- 5.4 Hosiden
- 5.5 Foster
- 5.6 BSE
- 5.7 Plantronics
- 5.8 Dover
- 5.8.1 Knowles
- 5.8.2 NXP Sound Solutions Business
- 5.9 Fortune Grand Technology
- 5.10 Netronix
- 5.11 Panasonic Electronic Devices
- 5.12 Sonion
- 5.13 Newjialian
- 5.14 STAR MICRONICS
- 5.15 Yucheng Electronic
- 5.16 Bujeon
- 5.17 CRESYN
- 5.18 Shandong Gettop Acoustic
- 5.19 HangZhou Unis Electronic
- 5.20 RightTechnology
- 5.21 Bluecom
- 5.22 Kingstate

- Receiver Fabrication Process
- Comparison between ECM and MEMS
- Shipment of Autofocus Camera Phones, 2007-2013
- Global CDMA/WCDMA Mobile Phone Shipment by Region, 2010-2012
- Smartphone Shipment of Mobile Phone Manufacturers Worldwide, 2010-2011
- Shipment of Netbook, iPad and Tablet PC, 2008-2012
- Supply Relation between Notebook Brand Vendors and ODMs and Shipment Proportion, 2010
- Supply Relation between Notebook Brand Vendors and ODMs and Shipment Proportion, 2011
- Output Value of Mobile Phone Electric-Acoustics by Product, 2010-2011
- Market Share of Mobile Phone Speaker Manufacturers Worldwide, 2010-2011
- Market Share of Mobile Phone Receiver Manufacturers Worldwide, 2010-2011
- Market Share of Hands-free Receiver Manufacturers Worldwide, 2010-2011
- Market Share of Bluetooth Earphone Manufacturers Worldwide, 2010-2011
- Market Share of Major ECM Microphone Manufacturers, 2010-2011
- Market Share of Major Mobile Phone Microphone Manufacturers, 2010
- Market Share of Major Notebook Computer Speaker Manufacturers, 2010
- Merry Revenue and Operating Margin, 2003-2011
- Average Price of Major Products of Merry, 2003-2010
- Merry Shipment by Product, 2004-2011
- Merry Client Distribution, 2006-2011
- GoerTek Revenue by Product, 2005-2011
- AAC Client Distribution, 2007-2009
- HOSIDEN Revenue by Product, FY2006-FY2012
- Foster Revenue by Business, FY2010-FY2012
- BSE Revenue and Operating Margin, 2007-2012

- BSE Revenue by Product, Q2-Q3, 2010
- Plantronics Revenue by Business, Q1FY2010-Q3FY2012
- Revenue of NXP Sound Solutions Business, 2001-2007
- Production Line Quantity of NXP Sound Solutions Business, 2001-2011
- Major Customers of NXP Sound Solutions Business
- Netronix Revenue and Operating Margin, 2005-2011
- Netronix Revenue by Product, 2010-2011
- Revenue and Operating Margin of STAR MICRONICS, FY2007-FY2012
- Revenue of STAR MICRONICS by Product, FY2007-FY2012
- Electro-Acoustic Product Shipment of STAR MICRONICS, FY2008-Q3FY2011
- Electro-Acoustic Product Revenue of STAR MICRONICS, FY2008-Q3FY2011
- Revenue and Operating Margin of Bluecom, 2007-2012
- Bluecom Revenue by Product, 2006-2012
- Bluecom Revenue by Customer, 2006-2012
- Global ECM Microphone Market Size, 2007-2015
- Output of Major ECM Microphone Manufacturers Worldwide, 2008-2010
- Procurement of MEMS Microphone Purchasers Worldwide, 2010-2011
- Global Micro Speaker/Receiver Market Size, 2007-2015
- Output of Major Micro Speaker/Receiver Manufacturers Worldwide, 2008-2010
- Global Shipment of Mobile Phones, 2007-2014
- Global Shipment of Mobile Phones and Growth Rates, Q1 2009-Q4 2011
- Global Major Mobile Phone Shipment by Brand, 2010-2011(Quarterly)
- Shipment of Major Mobile Phone Manufacturers Worldwide, 2010-2011
- Market Share of Smartphone OS, 2011
- Shipment and Growth Rate of Notebooks Worldwide, 2007-2013

- Shipment of Major Notebook Vendors Worldwide, 2010-2011
- Market Share of Major Notebook Vendors Worldwide, Q4 2010-Q1 2012
- Ranking of Global Notebook OEMs by Revenue, 2009-2010
- Micro Electronic-acoustic Device Manufacturers by Revenue, 2010-2011
- Supply Relations between Micro Speaker Suppliers and Top 6 Mobile Phone Manufacturers
- Supply Relations between Hands-free Receiver Suppliers and Top 6 Mobile Phone Manufacturers
- Supply Relations between Microphone Suppliers and Top 6 Mobile Phone Manufacturers
- Revenue and Growth Rate of Merry, Jan.2010-Jan.2012
- Merry Revenue by Product, 2005-2011
- Selected Financial Data of Merry Subsidiaries in Mainland China, 2008
- Revenue and Operating Margin of GoerTek, 2006-2011
- Gross Margin and Net Profit Margin of AAC, 2007-H1 2011
- Revenue and Pre-tax Profit of AAC, 2003-2011
- Revenue of ACC by Product, 2006-2011
- Operating Income of AAC, 2008-2010
- Revenue of AAC by Region, 2006-2009
- Revenue of AAC by Application, 2011
- R&D Expenditure of AAC, 2006-2010
- Patents of AAC, 2006-2010
- Selected Financial Data of AAC Subsidiaries, 2008
- Revenue and Operating Margin of Hosiden, FY2006-FY2012
- Selected Financial Data of Hosiden Subsidiaries in China
- Revenue and Operating Margin of Foster, FY2006-FY2012
- Revenue of Foster by Region, FY2009-FY2010
- Selected Financial Data of Foster Subsidiaries in China

- BSE Revenue by Customer, 2009-Q3 2011
- BSE Shipment by Customer, 2009-Q3 2011
- BSE Revenue by Product, Q3 2011
- Revenue and Operating Margin of Plantronics, FY2006-FY2012
- Gross Margin of Plantronics, FY2005-Q3FY2012
- Operating Margin of Plantronics, FY2005-Q3FY2012
- Revenue and Operating Margin of Plantronics, Q1FY2011-Q3FY2012
- Revenue of Plantronics by Region, Q1FY2010-Q3FY2012
- Revenue and Operating Margin of DOVER, 2005-2011
- Revenue and Operating Margin of DOVER Communication Technology Division, Q1 2010-Q4 2011
- Revenue of DOVER Communication Technology Division by Application, 2011
- Revenue of DOVER Communication Technology Division by Region, 2011
- MEMS Microphone Shipment Growth Rate of Knowles, 2003-2012
- Shipment Growth Rate of NXP Sound Solutions Business, 2003-2012
- Selected Financial Data of Dongguan Dalang Huihong Electronic Factory, 2008
- Selected Financial Data of Suzhou Fuhong Shun Electronics Co., Ltd., 2008
- Revenue and Growth Rate of Netronix, Dec.2009-Dec.2011
- Revenue and Operating Margin of Newjialian, 2004-2011
- Selected Financial Data of Mainland Subsidiaries of Bujeon Electronics, 2008
- Revenue and Operating Income of Shandong Gettop Acoustic, 2008-2011
- Staff Composition of Shandong Gettop Acoustic
- Microphone Output and Sales Volume of Shandong Gettop Acoustic, 2008-2010
- Micro Speaker/Receiver Output and Sales Volume of Shandong Gettop Acoustic, 2008-2010
- Output, Sales Volume, Capacity and Capacity Utilization of Shandong Gettop Acoustic, 2009-H1 2011
- Top Five Customers of Shandong Gettop Acoustic, 2009-H1 2011

- 
- Product Capacities of Bluecom
 - Revenue and Profit of Bluecom, 2008-Q3 2010
 - Revenue and Operating Margin of Kingstate, 2004-2011

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