



**Global and China Mobile (Cell) Phone
Assembly 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 mobile phone output in China increased by 15.5% over 2010 to 1.172 billion sets, among which, the export volume rose by 13.9% over 2010 to 885 million sets, with the export value climbed by 34.2% to USD62.76 billion. In 2011, the average export price of mobile phone saw an increase of 15.0% over 2010, recording the first rise after consecutive declines since 2007. This was largely attributable to the considerable shipment of higher-priced smart phones, especially iPhone.

The report highlights the following aspects:

- ④ Business model of the mobile phone industry, mobile phone market scale and competition pattern in China and beyond;
- ④ Top 45 Chinese mobile phone manufacturers by output, top 50 Chinese mobile phone exporters;
- ④ Development review and mobile phone business prospect for 2012 of nine global mobile phone enterprises;
- ④ Current status of five major Taiwanese mobile phone-related enterprises;
- ④ Current development and outlook for 2012 of 11 mainland Chinese mobile phone brand manufacturers;
- ④ 15 Chinese mobile phone IDH/integration companies;
- ④ 18 Chinese mobile phone manufacturing and supply chain enterprises.

It is no doubt that the mobile phone industry is one of the most competitive industries. Great changes have taken place in the industry every year, with the ranking of manufacturers undergoing ups and downs. The following shows the characteristics in the development of mobile phone industry in 2011.

1. Mobile phone manufacturing bases were transferring from coastal cities in South China to Inland China and Vietnam

Guangdong province boasts China's largest mobile phone manufacturing base, with the annual output in 2011 exceeding 600 million sets. But the increasing labor cost and operating cost in the province constitutes the potential impetus for mobile phone manufacturers to move their business outwards. A case in point is Hon Hai, which transferred its mobile phone base to Zhengzhou in Henan province. In 2011, the mobile phone output of Hongfujin Precision Electronics (Zhengzhou) surpassed 20 million sets, a substantial increase compared with less than 20,000 sets in 2010, and the revenue was as high as RMB35.5 billion. Moreover, the capacity transferred is of iPhone rather than low-end products. In 2011, the iPhone shipment hit 93.1 million sets, averagely priced at about USD275, 21% of which were made in Zhengzhou. In addition, the mobile phone output in Jiangxi also saw a rise of 75% to 25 million sets in 2011, approximately.

Vietnam is another transferring destination for mobile phone manufacture. The mobile phone export value of Vietnam increased from USD2.1 billion in 2010 to USD7.6 billion in 2011, up 262%. Samsung is the major contributor for the development of mobile phone manufacturing industry of Vietnam. In January 2012, Samsung established the largest overseas R&D center in Vietnam, with products involved including mobile phone, TV and other electrical appliances. Samsung plans to invest USD1.5 billion in Vietnam to build its largest overseas manufacturing base. It finished the phase II expansion project of its Vietnam-based plant in 2011, making the Yenpong-based mobile phone plant its largest mobile phone manufacturing base with an annual capacity of 150 million sets.

In 2011, the mobile phone output of Samsung's Vietnam-based plant totaled 96 million sets, among which, 95 million sets were exported with the value hitting USD5.8 billion, a substantial increase compared with the output of less than 40 million sets and the export value of less than USD1.9 billion in 2010. Samsung has three mobile phone manufacturing bases located in South Korea, China and Vietnam. In China, Samsung has three major plants, namely, Tianjin Samsung Communication Technology, Shenzhen Samsung Kejian Mobile Telecommunication Technology and Huizhou Samsung Mobile Communication, which all saw decline in output in 2011.

In addition, Nokia's manufacturing base in Vietnam is set to be put into production in 2012, by then, the output of Nokia in Dongguan is likely to decline to some extent. Moreover, Foxconn also increased its investment in Vietnam. According to the estimation from Vietnamese authority, the mobile phone export value of Vietnam in 2012 will increase by nearly 60% over 2011 to USD12 billion.

2. Knockoff phone, small and medium mobile phone brands had a difficult time while big brands with abundant capital support grew rapidly

The supply chain of knockoff mobile phone manufacturers was cracked down during the Universiade, leaving many shutting down. In 2011, small and medium brands in China had a difficult time and struggled for survival due to tight monetary policy, soaring miscellaneous costs, turbulent international situation and severe export environment. By contrast, big shots with abundant capital support grew rapidly, and time-honored players including Lenovo, Konka, Gionee, BBK/OPPO and Sangfei witnessed considerable growth in shipment.

3. ZTE and Huawei became strong challengers for global top 3 manufacturers by shipment

Compared with other homegrown manufacturers, ZTE and Huawei have unparalleled advantages, including R&D and promotion teams with tens of thousands of staff, customized support from operators all across the world, and sufficient capital supply. Even compared with foreign manufacturers, they also have outstanding cost control advantages. In terms of shipment, Huawei and ZTE had been included among the world's top 6 in 2011, and it is just a matter of time for both of them to thrust into the top 3.

4. In China, operator customization became a major force pushing the popularity of smartphone

All home appliance enterprises engaged in the production of mobile phone, with Konka, Changhong, TCL, Haier and Hisense included, launched their smartphone strategies for 2012, indicating that smartphone has become the mainstream in the market and time-honored manufacturers are expected to share a piece of pie from this due to the powerful industry chain integration capability, good relationship with operators as well as strong capital support required by the smart phone market, which are exactly the strengths of time-honored manufacturers but the weaknesses of small and medium brands.

3. ZTE and Huawei became strong challengers for global top 3 manufacturers by shipment

Compared with other homegrown manufacturers, ZTE and Huawei have unparalleled advantages, including R&D and promotion teams with tens of thousands of staff, customized support from operators all across the world, and sufficient capital supply. Even compared with foreign manufacturers, they also have outstanding cost control advantages. In terms of shipment, Huawei and ZTE had been included among the world's top 6 in 2011, and it is just a matter of time for both of them to thrust into the top 3.

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According to China Unicom, the market scale of smartphone priced below RMB1,000 in China is estimated to hit 90 million sets in 2012, while those priced between RMB1,000 and RMB2,000 realize 60 million sets. Considering this, China Unicom is scheduled to increase its subsidy on smartphone to snatch more market share. The case is the same for China Telecom and China Mobile.

In addition, Lenovo, ZTE and Huawei have shared the spoils from operator customization business, and other players including Konka, Changhong, TCL, Haier and Hisense are following suit.

5. Over 10 IDH/integration companies realized shipment of more than 10,000,000

In 2011, over 10 mobile phone IDH/integration companies including Water World Technology, Wingtech, Longcheer, Huiye, HuaQin Telecom Technology, TOPWISE, TINNO, YHL, DEWAV and Ginwave each realized shipment of more than 10,000,000.

6. The development outlook of supply chain manufacturers is promising

Supply chain manufacturers have seen breathtaking development in recent two years. The mobile phone export volume of China Brilliant Supply Chain Service increased from 25.70 million sets in 2010 to 45.675 million sets in 2011; the export volume of Shenzhen Everich Industry Development increased from 10.72 million sets in 2010 to 22.07 million sets in 2011; and the export volume of Xinlikang increased from 410,000 sets in 2010 to 4.24 million sets in 2011. The emergence of supply chain companies has provided favorable support to SMEs in material purchase, export declaration, logistics and financing.

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