Global and China Consumer Electronics Casing and Structural Parts Industry Report, 2011-2012

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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

The report highlights the following aspects:

- The status quo and outlook of consumer electronics market
- Mobile phone casing and structural parts market and industry pattern
- Laptop, tablet PC casing and structural parts market and industry pattern
- 27 mobile phone casing and structural parts manufacturers
- 9 laptop, tablet PC casing and structural parts manufactures
- Digital camera and TV casing and structural parts market
- Digital camera and TV structural parts manufacturers

In the 3G era, mobile phones are highly homogenized. A mobile phone increasingly functions as a PC. The CPU of mobile phone, particularly of smart phone is monopolized by Qualcomm. There are two competitors, INTEL and AMD, in the PC CPU market. But Qualcomm enjoys monopolistic superiority in mobile phone CPU market in the 4G era. Now it's difficult for mobile phone to be differentiated just with the conventional software and hardware. Therefore, the difference can be shown by display screen and casing.

Mobile phone manufacturers attach high importance to casing. Take Samsung for example, it is scheduled to launch mobile phones with ceramic case. Another case is Apple, which is set to unveil mobile phones with liquid metal case. Although these new technologies have yet been full-blown and there is little chance for commercialization within three to five years, the move indicates that mobile phone manufacturers have shifted their concerns from software and hardware to display screen and casing.

The three new mobile phone casing technologies have attracted attention: the first refers to NCVM (Non Conductive Vacuum Metallization); the second Insert Molding, and the third Unibody. However, a cleaning room and continuous magnetron sputtering equipment are required in the application of NCVM, which cause the high cost, and long term manufacturing engineering to be explored. In this sense, such a super giant like Foxconn would prefer to partner with Ways Technical in NCVM application.

Insert Molding technology stems from Galaxy SII developed by Samsung. The technology combines the virtues of plastic case and metal structure. Plastic case features low cost, while the metal structure can enhance the overall intensity of the mobile phone. Since the smart phone has very big screen (some are even 5 inches), the technology is a compromise that remedies the defeats of plastic case (poor intensity) and metal case (high cost).

Unibody is derived from iPad. At present, only HTC mobile phone is equipped with this technology featuring the highest cost. There are only two manufacturers, Taiwan-based Catcher and Foxconn Tech, can massively supply mobile phone case with Unibody technology. Considering the possible inadequate capacity of mobile phone case with Unibody technology, Apple gave up its plan to employ the design. However, Catcher increased 3,000 units of CNC to improve the capacity in 2012. And it is estimated that the new-generation iPhone will employ the Unibody technology.

In laptop and tablet PC, Apple made a success as a pioneer to apply Unibody technology. Foxconn Tech is the major iPad casing provider for Apple. And the case of Apple MacBook Air is equipped with the laptop case with the highest cost of over USD100, equivalent to 5-7 times of ordinary laptop case. Catcher is the major case provider for MacBook Air. Although Catcher suffered short-term business suspension due to the air pollution incident in Suzhou, the company quickly transferred its capacity from Suzhou to Suqian to avoid loss on business performance.

It is unlikely for Ultrabook to employ expensive case as Apple does. But for light and thin features, metal case is a must. Thus, Ultrabook employs stamping technology in cover, and the rest part is made of plastics. There are a few manufacturers utilizing glass fiber which can be only used in bottom. The price of ultrabook is much more than the mainstream price of laptop. Consequently, Ultrabook is doomed to be confined within high-end market, with the market share no more than 15%.

Tablet PC faces cut-throat competition in price. All the manufactures except Apple are trying every means to cut down the cost. And most manufacturers adopt traditional plastic case plus glass front cover. But unfortunately, the sales volume is not high.

Revenue of Leading Mobile Phone Casing and Structural Parts Manufacturers Worldwide, 2009-2011

MANUFACTURERS	REVENUE 2009 (USD MLN)	REVENUE 2010 (USD MLN)	REVENUE 2011 (USD MLN)
Liteon Mobile	494	754	1,008
Jabil Greenpoint	580	420	320
FIH	450	390	420
KH-VATEC	370	298	286
BYD ELECTRONICS	190	220	230
NOLATO	156	218	86
HI-P	219	210	188
FOXCONN TECH	105	187	393
INTOPS	182	269	371
Catcher	62	179	390
JANUS	99	142	208
P&TEL	189	162	49
BALDA	160	104	92
NYPRO	108	162	143
YUSUNG	50	55	48
JINWON	70	75	116
Ways Technical	52	221	263
Mobase	98	78	125
Shinyang	120	96	135

Note: only revenue from mobile phone business is included for Foxconn Tech and Catcher.
Source: Global and China Consumer Electronics Casing and Structural Parts Industry Report, 2011-2012

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