# Global and China Consumer Electronic Case and Structural Parts Industry Report, 2013

July 2013

ResearchInChina
www.researchinchina.com

## 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.

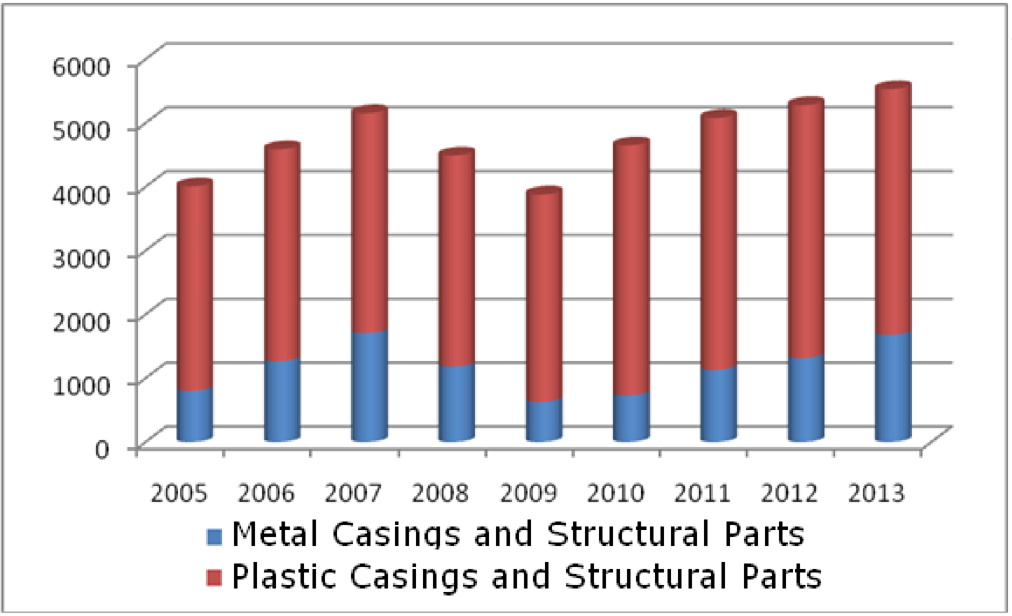
## INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

# Abstract

Amid high degree of homogeneity of products, mobile phone vendors have started to be concerned about the differentiation of mobile phone casings. In 2012, the market value of mobile phone casings and structural parts reached USD5.28 billion and the market share ratio between plastic and metal ones was 3:1, which is expected to fall to 2.5:1 in 2013 as vendors invest more in metal casings.

**Market Value of Mobile Phone Casings and Structural Parts, 2005-2013 (USD mln)**




Source: ResearchInChina *Global and China Consumer Electronic Case and Structural Parts Industry Report, 2013*

Currently, three mobile phone casing technologies have drawn attention ------ NCVM (Non Conductive Vacuum Metallization), Insert Molding and Unibody.

NCVM has three major advantages: first, it can reduce electromagnetic interference for mobile communications, improve signal strength and call clarity. Second, NCVM allows plastic surface to represent metallic texture which improves added value of products. Third, NCVM's semi-transparent feature facilitates the casing design. However, NCVM requires high-cost cleaning rooms and continuous magnetron sputtering devices, plus the related manufacturing process needs a long time to explore. Ways Technical and Foxconn employ NCVM now.

Stemming from Samsung's Galaxy SII, Insert Molding combines advantages of both plastic casings and metal structural parts. Plastic casings are featured with low cost, and metal structural parts make mobile phones solid enough to resist bumping. For the large size of smart phone (some models even have a size of up to 5 inches), the strength of plastic casings and structural parts is obviously insufficient, but metal ones are costly, so Insert Molding functions as a compromise.



Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080
Phone: +86 10 82600828 ● Fax: +86 10 82601570 ● www.researchinchina.com ● report@researchinchina.com

Unibody integrated molding technology originates from Apple's iPad. Currently, only HTC phones use the most expensive design. Now, only Taiwan's Catcher and FOXCONN TECH are able to provide abundant mobile phone casings made by such technology.

**The report studies the following aspects:**

Overview of the global consumer electronics industry, including market size and market share of mobile phones, tablet PC, laptop computers and digital cameras;

Global consumer electronics case and structural parts market, covering materials and technology evolution, development trends, market size and competition patterns of casings and structural parts used for mobile phones, tablet PC, laptop computers, digital cameras and Flat-panel TVs;

Analysis on main supporting casing and structural part manufacturers of the global consumer electronics (mobile phones, computers, digital cameras and TVs, etc.), including profile, financial data of listed companies, technology trends, capacity layout and the latest strategic development of 26 mobile phone supporting vendors, 9 laptop supporting vendors, 3 digital camera supporting vendors and 5 TV supporting vendors.

## Table of contents

# Table of contents

## Selected Charts

- Global Laptop Shipment and YoY Growth Rate, 2008-2013
- Shipment and Market Share of Major Global Laptop Vendors, Jan-Jun 2013
- Market Share of Major Global Laptop Vendors, 2010Q4-2012Q1
- China's Laptop Output and YoY Growth Rate, 2008-2012
- Global Tablet PC Shipment and YoY Growth Rate, 2010-2013Q1
- Shipment and Market Share of Major Global Tablet PC Vendors, 2012Q1-2013Q1
- Global Digital Camera Shipment and YoY Growth Rate, 2008-2013
- Global Digital Camera Shipment by Region, 2008-2013
- Market Share of Global Digital Camera Brands, 2009-2011
- China's Digital Camera Output and YoY Growth Rate, 2008-2013
- Global Mobile Phone Shipment and YoY Growth Rate, 2008-2012
- Shipment and Market Share of Global Mobile Phone Vendors, 2011-2012
- China's Mobile Phone Output and YoY Growth Rate, 2008-2013
- Global Smart Phone Shipment and YoY Growth Rate, 2008-2012
- Global Smart Phone Shipment and Proportion in Mobile Phone Shipment, 2008-2012
- Smart Phone Shipment and Market Share of Global Mobile Phone Vendors, 2011-2012
- Global Smart Phone Market Share by Country (by Shipment), 2011-2016E
- Property Comparison between Mobile Phone Casing Materials
- Aluminum Alloy Integrally Molded IPHONE 5
- Market Value of Mobile Phone Casings and Structural Parts, 2005-2013
- Revenue of Global Major Mobile Phone Casing and Structural Part Companies, 2009-2011
- Market Share of Global Major Metal Mobile Phone Casing and Structural Part Companies, 2012
- Mobile Phone Shipment and Growth Rate of Nokia, 2003-2012
- Geographical Distribution of Mobile Phone Output of Nokia, 2010-2012
- Industry Chain Suppliers of Nokia in Xingwang Industrial Park

## Selected Charts

- Supply Breakdown of Mobile Phone Casing and Structural Part Suppliers of Nokia, 2012
- Mobile Phone Shipment of Motorola, 2009-2012
- Supply Breakdown of Mobile Phone Casing and Structural Part Suppliers of Motorola, 2012
- Mobile Phone Shipment and Annual Growth Rate of Samsung, 2003-2013
- Geographical Distribution of Mobile Phone Output of Samsung, 2010-2012
- Supply Breakdown of Mobile Phone Casing and Structural Part Suppliers of Samsung, 2012
- Mobile Phone Shipment of Sony, 2010-2012
- Supply Breakdown of Mobile Phone Casing and Structural Part Suppliers of Sony, 2012
- Mobile Phone Shipment and Annual Growth Rate of LG, 2003-2012
- Geographical Distribution of Mobile Phone Output of LG, 2010-2012
- Supply Breakdown of Mobile Phone Casing and Structural Part Suppliers of LG, 2012
- Revenue and Gross Margin of RIM , FY2007-2012
- Mobile Phone Shipment of RIM, 2009-2012
- Supply Breakdown of Mobile Phone Casing and Structural Part Suppliers of RIM, 2011
- Revenue and Net Profit Margin of APPLE, FY2006-2012
- IPHONE Shipment of Apple, 2008-2012
- Supply Breakdown of Mobile Phone Casing and Structural Part Suppliers of Apple, 2012
- Revenue and Gross Margin of HTC, 2006-2012
- Shipment of HTC, 2004-2012
- Supply Breakdown of Mobile Phone Casing and Structural Part Suppliers of HTC, 2012
- Mobile Phone Shipment of TCL, 2006-2011
- Mobile Phone Shipment of TCL by Region, 2006-2012
- Supply Breakdown of Mobile Phone Casing and Structural Part Suppliers of TCL, 2012
- Mobile Phone Revenue and Net Profit Margin of ZTE, 2008-2012
- Supply Breakdown of Mobile Phone Casing and Structural Part Suppliers of ZTE, 2012

## Selected Charts

## Selected Charts

- Precision Metal Processing
- Revenue and Operating Margin of Jabil, FY2005-2012
- Revenue of Jabil by Business, FY 2012
- Sales Revenue and Net Income of YUSUNG, 2004-2011
- Sales Revenue and Net Income of JINWON, 2004-2011
- Equipment of JIN WON Electronics
- Affiliated Companies of Chicheng
- Revenue and Gross Margin of Chicheng, 2008-2012
- Revenue of Chicheng by Business, 2012
- Distribution of Clients of Chicheng, 2008-2011
- Finance of Subsidiaries of Chicheng in Mainland China, 2012
- Revenue and Operating Margin of P&TEL, 2004-2012
- Revenue and Operating Margin of KH-VATEC, 2002-2012
- Revenue of KH-VATEC by Client, 2006-2013
- Revenue and EBITDA of Nolato, 2008-2012
- Revenue Structure of Noalto by Division, 2005-2012
- Revenue and Gross Margin of HI-P, 2008-2012
- Revenue of HI-P by Division, 2010-2012
- Revenue of HI-P by Region, 2007-2012
- Revenue and Operating Margin of Foxconn Technology, 2004-2012
- Revenue and Operating Profit of Subsidiaries of Foxconn Technology in Mainland China, 2010-2012
- Global Distribution of LITEONMOBILE
- Revenue and Gross Margin of LITEONMOBILE, 2008-2012
- Revenue Structure of LITEONMOBILE by Division, 2012
- Gains and Losses of Subsidiaries of LITEONMOBILE in Mainland China, 2012

## Selected Charts

- Revenue and Operating Margin of COXON, 2006-2012
- Revenue of COXON by Product, 2012
- Regional Product Distribution of COXON, 2012
- NCVM Capacity and Equipment Status of COXON
- Revenue and Operating Margin of INTOPS, 2002-2012
- Revenue and Operating Margin of FIH, 2004-2011
- Revenue of FIH by Region, 2007-2011
- Gross Profit of FIH by Region, 2007-2011
- Revenue of FIH by Client, 2010-2011
- Structure of Affiliated Companies of Ways Technical
- Revenue and Gross Margin of Ways Technical, 2006-2012
- Revenue of Ways Technical by Product, 2012
- Revenue of Ways Technical by Region, 2012
- Organizational Structure of JANUS (Dongguan)
- Revenue and Gross Margin of JANUS (Dongguan), 2007-2012
- Product Capacity of JANUS (Dongguan), 2007-2012
- Distribution of Customer Order Revenue of JANUS (Dongguan), 2012
- Revenue of JANUS (Dongguan) by Product, 2012
- Revenue and Operating Profit of Mobase , 2007-2013
- Main Products of SILITECH
- Revenue and Gross Margin of SILITECH, 2008-2012
- Production and Sale of SILITECH by Product, 2011-2012
- Financial Data of Subsidiaries of SILITECH in Mainland China, 2012
- Sales Revenue and Operating Profit of SILITECH, 2003-2012
- Global Presence of JUTENG

## Selected Charts

- Revenue and EBIT of JUTENG, 2007-2018
- Distribution of Clients of JUTENG, 2009-2012
- Investment Distribution of JUTENG in Mainland China
- Revenue and Profit before Tax of Huan Hsin, 2003-2012
- Revenue of Huan Hsin by Product, 2009-2012
- Revenue and Operating Margin of Catcher, 2007-2012
- Revenue of Catcher by Client, 2011-2012
- Investment Distribution of Catcher in Mainland China
- Revenue and Gross Margin of Waffer, 2003-2012
- Corporate Structure of Pegatron
- Revenue and Gross Profit of Pegatron, 2008-2012
- Revenue and Gross Profit of Chia Chang, 2008-2012
- Main Products of Chia Chang
- Capacity, Output and Output Value of Main Products of Chia Chang, 2011-2012
- Revenue and EBITDA of NISHOKU, 2008-2012
- Revenue of NISHOKU by Application, 2010-2011
- Revenue and YoY Growth Rate of Yorkey Optical, 2008-2012
- Net Income and YoY Growth Rate of Yorkey Optical, 2008-2012
- Revenue Breakdown of Yorkey Optical by Product, 2008-2012
- Revenue Breakdown of Yorkey Optical by Region, 2008-2012
- Gross Margin of Yorkey Optical , 2008-2012
- Subsidiaries of Yorkey Optical
- Sales Revenue and YoY Growth Rate of Nidec Copal, FY2008-2012
- Net Income and YoY Growth Rate of Nidec Copal, FY2008-2012
- Main Business of Subsidiaries of Nidec Copal in the World

## Selected Charts

- Revenue and YoY Growth Rate of AVY Precision Technology, 2008-2012
- After-tax Net Income and YoY Growth Rate of AVY Precision Technology , 2008-2012
- Gross Margin of AVY Precision Technology , 2008-2012
- Major Clients of AVY Precision Technology
- Production Bases and Main Products of AVY Precision Technology
- Revenue and YoY Growth Rate of Guangzhou Echom, 2008-2012
- Revenue of Guangzhou Echom by Product, 2008-2012
- Sales Revenue of Guangzhou Echom by Region, 2008-2012
- Gross Margin of Guangzhou Echom by Product, 2008-2012
- Gross Margin of Guangzhou Echom by Region, 2008-2012
- Revenue Contribution of Top 5 Clients of Guangzhou Echom, 2012
- Capacity, Output, Sales Volume and Inventory of TV Structural Parts of Guangzhou Echom, 2011-2012
- Sales Network of Taoshi Mould Group
- Main Cooperative Brands of Taoshi Mould Group
- Major Clients of Dongguan Konka Mould Plastic

# How to Buy

**You can place your order in the following alternative ways:**

1.Order online at www.researchinchina.com

2.Fax order sheet to us at fax number:+86 10 82601570

3. Email your order to: report@researchinchina.com

4. Phone us at +86 10 82600828/ 82601561

**Choose type of format**

PDF (Single user license) …………..2,300 USD

Hard copy ………………….……. 2,400 USD

PDF (Enterprisewide license)…....... 3,600 USD

**※ Reports will be dispatched immediately once full payment has been received. Payment may be made by wire transfer or credit card via PayPal.**

| **Party A:** | | | |
|---|---|---|---|
| Name: | | | |
| Address: | | | |
| Contact Person: | | Tel | |
| E-mail: | | Fax | |

| **Party B:** | | | |
|---|---|---|---|
| Name: | Beijing Waterwood Technologies Co., Ltd (ResearchInChina) | | |
| Address: | Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080 | | |
| Contact Person: | Liao Yan | Phone: | 86-10-82600828 |
| E-mail: | report@researchinchina.com | Fax: | 86-10-82601570 |
| Bank details: | Beneficial Name: Beijing Waterwood Technologies Co., Ltd<br>Bank Name: Bank of Communications, Beijing Branch<br>Bank Address: NO.1 jinxiyuan shijicheng,Landianchang,Haidian District,Beijing<br>Bank Account No #: 110060668012015061217<br>Routing No # : 332906<br>Bank SWIFT Code: COMMCNSHBJG | | |

| Title | Format | Cost |
|---|---|---|
| | | |
| *Total* | | |

ResearchInChina
www.researchinchina.com