

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

**July 2013**

## 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.

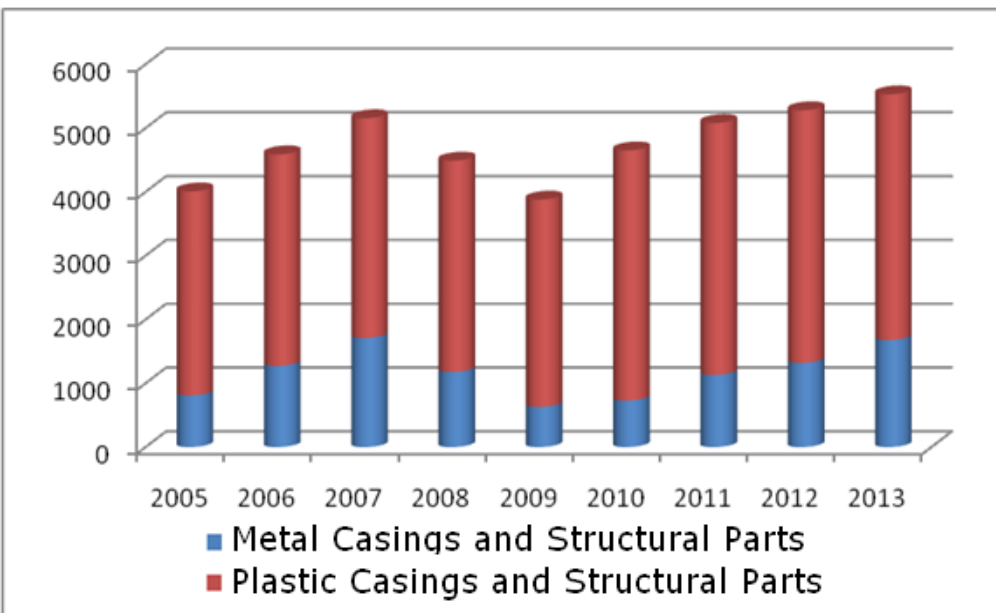
## INFORMATION SOURCES

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)**



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.

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.

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- 1.1 Laptop Market
- 1.2 Tablet PC Market
- 1.3 Digital Camera Market
- 1.4 Mobile Phone Market
- 1.5 Smart Phone Market

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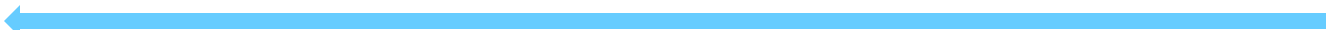
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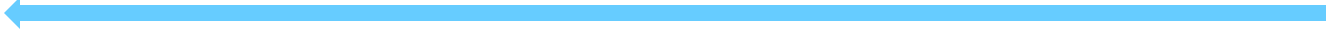


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