



**Global and China Micro Electronic-
Acoustics Component Industry Report,
2013**

Sep. 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

The report includes the following aspects:

- 1, Introduction to Micro Electronic-Acoustics
- 2, Downstream Market of Micro Electronic-Acoustics
- 3, Micro Electronic-Acoustics Industry
- 4, 21 Micro Electronic-Acoustics Enterprises

Micro Electronic-Acoustics mainly refers to the electro-acoustic products installed in mobile phones, laptops and other mobile electronic products, including handsfree, earphone, receiver, speaker system and microphone. In the wake of the outbreak of smart phone, the market value of Micro Electronic-Acoustics soared to USD5,160 million in 2011 and USD6,347 million with the growth rate of 26.3% in 2012. The growth of the market is expected to slow down to 13.1% in 2013, valuing USD7,180 million, of which handsfree and speaker system will see the strongest growth.

Handsfree and speaker system industries are labor-intensive industries, requiring enterprises to control labor costs. Small enterprises feel difficult to compete with large companies, and their competitiveness becomes increasingly weak.

For example, the revenue of South Korea BSE slumped from USD156 million in 2009 to USD20 million in 2012. The revenue of the listed company New Jialian dropped from RMB364 million in 2010 to RMB223 million in 2012, and is expected to fall below RMB200 million in 2013. The electro-acoustic revenue of Japan STAR MICRONICS also descended from JPY7,646 million in FY2010 to JPY3,233 million in FY2013, so STAR MICRONICS transferred its electro-acoustic business to Foster in August 2013. Japan Hosiden may transfer the business to Foster as well.

In the booming MEMS microphone field, Knowles still performs outstandingly with 50% market share. However, vendors represented by Apple have reduced the procurement from Knowles in order to avoid the over-reliance on it. The second and fourth positions in the market are occupied by Chinese manufacturers as Apple's main suppliers; both of them have produced ECM and used the MEMS foundries of Germany Infineon.

AAC has obtained nearly USD100 million in revenue, and its main products are used in iPhone and iPad mini. GoerTek's MEMS microphones are basically applied to iPhone. The third-ranked ADI primarily produces high-performance products at high selling prices, and these products find application in Apple's iPhone 5. Infineon acts as a MEMS foundry of the companies who lack technology, such as China's AAC and GoerTek, Japan-based Hosiden and South Korea BSE.

STMicroelectronics ranks fifth, mainly serving Nokia, HTC, Amazon Kindle and laptop vendors. Its shipments hit 60 million in 2012, breaking through the zero record in 2010. STMicroelectronics purchases MEMS wafers from Japan Omron.

Revenue of Major Electronic-Acoustics Vendors, 2010-2013 (USD mln)

	2010	2011	2012	2013E
Merry	251	271	262	322
GoerTek (Audio Product Revenue only)	294	508	820	1088
AAC	440	648	995	1466
Hosiden (Audio Product Revenue only)	269	198	164	150
Foster (Excluding Automotive Speaker Revenue)	864	1106	1311	1408
BSE	55	20	21	20
Plantronics	684	714	762	866
Knowles (Audio Product Revenue only)	425	725	910	1120
Fortune Grand Technology	108	116	110	102
Panasonic Electronic Devices	210	208	220	206
ZSOUND	113	133	141	160
New Jialian	54	58	35	25
STAR MICRONICS	51	30	40	45
Bujeon	156	219	276	328
Cresyn	173	210	281	308

Source: researchinchina Global and China Micro Electronic-Acoustics Component Industry Report, 2013

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1. Introduction to Mobile Electro-Acoustic Devices

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- 1.2 Mobile Phone Loudspeaker System
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