



**Global and China Micro Electronic-
Acoustics Component Industry
Report, 2013-2014**

Oct. 2014

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 highlights the followings:

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

The micro electronic-acoustics industry began to deteriorate in the second half of 2013, reflecting a broad decline in gross margin and average selling price of products except earphone and headphone. The industry leader—AAC has accidentally suffered downdrafts entering 2014 for several reasons: it is impossible for the mobile phone market including the smartphone market to reproduce high growth, and China's smartphone market shows signs of decline. According to data released by China Academy of Telecommunication Research of MIIT, the domestic mobile phone market accumulated shipments of 293 million units in January-August 2014, down 24% as opposed to 396 million units a year earlier, including 254 million smartphones (down 11.3% yr-on-yr). Besides, the tablet PC market apparently stopped growing e.g. a slowdown in iPad shipments, in contrast to the slightly improved laptop computer market.

Revenue of Major Micro Electronic-Acoustics Component Vendors, 2010-2014

(USD mln)

| | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------------------------|-------|-------|-------|-------|-------|
| Merry | 251 | 271 | 262 | 341 | 415 |
| GoerTek | 294 | 508 | 890 | 1311 | 1672 |
| AAC | 440 | 648 | 995 | 1,308 | 1,397 |
| Hosiden | 269 | 198 | 164 | 145 | 160 |
| Foster | 1,264 | 1,476 | 1,730 | 1,670 | 1,680 |
| BSE | 60 | 203 | 205 | 270 | 290 |
| Knowles | 425 | 511 | 671 | 778 | 780 |
| Fortune Grand Technology | 108 | 116 | 110 | 102 | 80 |
| Panasonic Electronic Devices | 210 | 208 | 220 | 206 | 180 |
| New Jialian | 54 | 58 | 35 | 25 | 20 |
| Star Micronics | 51 | 30 | 40 | 45 | — |
| Bujeon | 156 | 219 | 259 | 407 | 450 |
| Cresyn | 173 | 280 | 316 | 455 | 560 |

On the other hand, the micro electronic-acoustics industry amid intensified competition has created space for generous profits in the transfer process from manual to automatic, and players have now completed the layout of automatic production lines, leading to non-existence of potential for cost reduction. Nowadays, mobile phone competition focuses on thickness, CPU, screen and camera, less concerned about sound performance, whose improvements depend on earphone rather than the phone itself, thus vendors prefer to adopt cheap electro-acoustic components.

In the field of micro electromechanical system (MEMS) microphone, large MEMS foundries or IDMs provide cheap MEMS dies which causes a drastic drop in MEMS microphone prices. The fierce price war has brought a rare loss for Knowles, not to mention other companies.

Mobile phone audio frequency is developing towards integration, speaker/receiver is firstly integrated into speaker modules, then box, and now equipped with function of LDS antenna. Then there is microphone mounted on FPC which enables flexibility for addition of multiple FPCs to mobile phones, simplifies circuit board design, improves stability and reduces thickness. All audio frequency components in a mobile phone may be integrated into a module in the future to bring the price down.

Micro electro-acoustic vendors have intensified efforts to develop non-electro-acoustic products to compensate for the decline in performance, but the huge initial investment is a burden to the overall gross margin. As the only highlight in electro-acoustics, headphones even those priced above USD100 won the broad market following the popularity of expensive phones such as iPhone, so did China's bluetooth headphone in the wake of booming auto sales. Merry, Cresyn and GoerTek best represent companies prosperous in the headphone business.

1. Introduction to Mobile Electro-Acoustic Components

- 1.1 Mobile Phone Receiver
- 1.2 Mobile Phone Speaker
- 1.3 Micro Microphone
- 1.4 Introduction to MEMS Microphone
- 1.5 Market and Industry of MEMS Microphone
- 1.6 Micro Loudspeaker
- 1.7 Trends of Mobile Phone Electro-Acoustic Components

2. Downstream Market of Micro Electro-Acoustic Products

- 2.1 Global Mobile Phone Market
- 2.2 Global Smartphone Market
- 2.3 China Mobile Phone Market
- 2.4 Tablet PC Market
- 2.5 Laptop Computer Market
- 2.6 Desktop PC Market

3. Micro Electronic-Acoustics Industry

- 3.1 Industry Ranking
- 3.2 Market Share by Products
- 3.3 Headphone Market
- 3.4 MEMS Microphone Market
- 3.5 MEMS Microphone Industry

3.6 Relationship between Electronic-Acoustic Component Vendors and Mobile Phone Vendors

3.7 Laptop Speaker

3.8 China Earphone Industry

4. Micro Electronic-Acoustic Component Vendors

4.1 Knowles

4.2 Merry

4.3 GoerTek

4.4 AAC

4.5 Hosiden

4.6 Foster

4.7 BSE

4.8 Bujeon

4.9 Cresyn

4.10 Fortune Grand Technology

4.11 Netronix

4.12 Panasonic Electronic Devices

4.13 Sonion

4.14 New Jialian

4.15 Star Micronics

4.16 Jiangsu Yucheng Electronic

4.17 Shandong Gettop Acoustic

4.18 Hangzhou Unis Electronic

4.19 Right Technology

4.20 Bluecom

4.21 Plantronics

- Smart Phone Audio Frequency System
- Global ECM Microphone Market Size, 2007-2015E
- Output of Major Global ECM Microphone Companies, 2008-2010
- Purchase Quantity of Global MEMS Microphone Buyers, 2010-2011
- Global Micro Speaker / Receiver Market Size, 2007-2015E
- Output of Major Global Micro Speaker / Receiver Companies, 2008-2010
- Global Mobile Phone Shipment, 2007-2015E
- Worldwide Mobile Phone Sales to End Users by Vendor in 2013 (Thousands of Units)
- Worldwide Smartphone Sales to End Users by Vendor in 2013 (Thousands of Units)
- Worldwide Smartphone Sales to End Users by Operating System in 2013 (Thousands of Units)
- Shipment of Top 13 Global Smartphone Vendors, 2013-2015E
- China's Monthly Mobile Phone Shipment, Jan.-Aug. 2014
- Global Tablet PC Shipment, 2011-2016E
- Market Share of Main Tablet PC Brands, 2013
- Output of Global Tablet PC Vendors, 2012-2013
- Laptop Computer Shipment, 2008-2015E
- Shipment of Major Global Laptop ODMs, 2010-2013
- Desktop PC Shipment, 2008-2015E
- PC Shipment of Top 5 Vendors Worldwide, Q4 2013
- PC Shipment of Top 5 Vendor Worldwide, 2013
- Ranking of Micro Electronic-Acoustics Component Industry
- Operating Margin of Major Electronic-Acoustics Component Vendors, 2010-2014
- Market Share of Major Global Headphone Companies (by Shipment), 2014
- Market Share of Major Global Headphone Companies (by Value), 2014
- Market Share of Major OCC Headphone Companies (by Value), 2014

- Market Share of Major Mobile Bluetooth Headphone Companies (by Value), 2014
- MEMS Microphone Market Size, 2012-2018E
- ASP of MEMS Microphone, 2010-2019E
- Ranking of Global MEMS Microphone Companies by Revenue, 2012
- Global MEMS Microphone Market Share in Value, 2013
- Global MEMS Microphone Die Market Share in Value (Volume), 2013
- Top MEMS Suppliers in the Mobile Phone and Tablet Market, 2013 (Revenue Breakdown by Product Type)
- Supply Breakdown of Micro Speaker Suppliers of Six Major Mobile Phone Vendors, 2014
- Supply Breakdown of Handfree Suppliers of Six Major Mobile Phone Vendors, 2014
- Supply Breakdown of Microphone Suppliers of Six Major Mobile Phone Vendors, 2014
- Major Clients of Knowles
- Revenue of Knowles by Product, 2013
- Revenue and EBITDA of Knowles, 2008-2014
- Revenue and Operating Margin of Knowles, 2008-2014
- Net Income and Assets of Knowles, 2009-2013
- Revenue of Knowles by Business, 2011-2013
- Operating Income of Knowles by Business, 2011-2013
- Client Distribution of Knowles, 2013
- Revenue of Knowles by Region, 2011-2013
- Quarterly Revenue and Operating Income of Knowles, Q1 2012-Q2 2014
- Organization Chart of Merry
- Monthly Revenue and Growth Rate of Merry, Aug. 2012-Aug. 2014
- Revenue of Merry by Product, 2005-2014
- Output of Merry by Product, 2010-2013
- Revenue of Merry by Client, 2014

- Selected Financial Data of Merry Subsidiaries in Mainland China, 2012
- Revenue and Operating Margin of GoerTek, 2006-2014
- Top 5 Clients of GoerTek, 2012
- Top 5 Clients of GoerTek, 2013
- Quarterly Revenue of GoerTek, Q1 2009-Q2 2014
- Gross Margin and Net Profit Margin of GoerTek, Q1 2009-Q2 2014
- Inventory Turnover Days of GoerTek, Q1 2009-Q2 2014
- Organization Chart of AAC
- Revenue and Gross Margin of AAC, 2007-2014
- Revenue and EBIT Margin of AAC, 2003-2014
- Consolidated Balance Sheet of AAC, 2012-2016E
- Major Clients of AAC
- Revenue of AAC by Product, 2006-2014
- Operating Income Breakdown of AAC, 2008-2013
- Revenue of AAC by Region, 2006-2013
- Revenue and Operating Margin of Hosiden, FY2006-FY2014
- Revenue and Operating Margin of Foster, FY2006-FY2015E
- Revenue of Foster by Region, FY2009-FY2012
- Revenue of BSE by Client, 2009-Q3 2011
- Shipment of BSE by Client, 2009-Q3 2011
- Revenue of BSE by Product, Q3 2011
- Financial Data of Cresyn's Key Subsidiaries, 2013
- Selected Financial Data of Dongguan Dalang Huihong Electronics Factory, 2008
- Selected Financial Data of Suzhou Fu Hong Shun Electronics Co., Ltd., 2008
- Monthly Revenue and Growth Rate of Netronix, Aug. 2012-Aug. 2014

- Revenue and Gross Margin of Sonion, 2009-2013
- Organization Chart of New Jialian
- Revenue and Operating Margin of New Jialian, 2004-2014
- Electro-Acoustic Product Shipment of Star Micronics by Application, FY2008-FY2013
- Electro-Acoustic Product Revenue of Star Micronics by Application, FY2008-FY2013
- Revenue and Operating Income of Gettop, 2008-2014
- Microphone Output and Sales Volume of Gettop, 2008-2010
- Micro Speaker/Receiver Output and Sales Volume of Gettop, 2008-2010
- Cost Structure of Bluecom, 2012-H1 2014
- Capacity of Bluecom by Product
- Revenue and Profit of Bluecom, 2008-Q3 2010
- Revenue and Operating Margin of Plantronics, FY2006-FY2015E
- Gross Margin of Plantronics, Q2 2013-Q2 2014
- Revenue of Plantronics by Region, FY2012-FY2014
- Receiver Manufacturing Process
- Comparison between ECM and MEMS
- Global 3G/4G Mobile Phone Shipment by Region, 2011-2014
- Market Share of Global Mobile Phone Mini Speaker Companies (by Value), 2014
- Market Share of Global Handfree Companies, 2014
- Market Share of Major Laptop Speaker Companies, 2012
- Organization and Operation of Merry
- Revenue and Operating Margin of Merry, 2004-2014
- Revenue and Gross Margin of Merry, 2007-2014
- Client Distribution of Merry, 2006-2013
- Client Distribution of AAC, 2007-2013

- Revenue of Hosiden by Product, FY2006-FY2014
- Revenue of Foster by Business, FY2010-FY2014
- Revenue and Operating Income of BSE, 2007-2014
- Revenue of BSE by Product, Q2-Q3 2010
- Revenue and Operating Margin of Netronix, 2005-2014
- Organization Structure of Netronix
- Revenue of Netronix by Product, 2010-2013
- Revenue and Operating Margin of Star Micronics, FY2007-FY2012
- Revenue of Star Micronics by Product, FY2007-FY2012
- Organization Structure of Hangzhou Unis Electronic
- Organization Structure of Right Technology
- Organization Structure of Bluecom
- Revenue and Operating Margin of Bluecom, 2007-2014
- Revenue of Bluecom by Product, 2006-2014
- Revenue of Bluecom by Client, 2006-2012
- Revenue of Plantronics by Business, FY2011-FY2014

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