



**Global and China Earphone 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

Global and China Earphone Industry Report, 2013-2014 focuses on the following:

1. Earphone overview
2. Earphone market
3. Earphone industry
4. 8 branded earphone vendors
5. 13 earphone OEMs

The report covers headphone, earphone and headset.

Global earphone shipments are estimated to reach 306 million in 2014, up 12.5% year on year, equalling about USD 6.6 billion by value, up 11.9% from a year earlier. The earphone can be divided into Bluetooth communications, sports earphone, OCC (Office Call Center), gaming earphone, HiFi earphone and normal earphone.

The average price of normal earphone is usually no more than USD 2, while high-end earphone could be worth USD 300. Plantronics and GN Netcom concentrate on OCC, Beats focuses on Pop, Skullcandy dominates sports, Turtle Beach (VTB) and Razer on gaming, while Samsung, LG and Motorola pull attention to Bluetooth communications, Logitech devotes to PC, and established companies like Sennheiser and AKG dedicate to HiFi.

Ranking of Earphone Brand Vendors by Revenue, 2013 & 2014

(USD mln)

	2014E	2013
Beats	1,280	1,060
Plantronics	860	802
Sennheiser	780	767
Sony	620	580
GN Netcom	451	422
Harman (including AKG)	430	360
Bose	350	330
JVC	290	260
Philips	260	220
Logitech	248	266
Skullcandy	228	210
VTB	186	178
Audio-Technica	106	110

Ranking of Earphone OEMs by Revenue, 2013 & 2014

(USD mln)

	2014E	2013
Foster	580	510
CRESYN	560	455
Goertek	320	258
Merry	213	160
Fujikon	208	190
Bluecom	154	53

The popularity of high-priced Apple and Samsung's Galaxy revolutionized earphone market. As mobile phone has become the center of the young people's life, they are willing to spend USD 300 to buy premium earphones, which have expanded from small niche market of music lovers to mass market of the youth, attracting many brands into the market.

The emergence of Beats radically changed earphone industry. Since the establishment in 2008, Beats defeated all established earphone companies in less than 10 years to put itself on the throne globally. The success of Beats depends not on acoustic fidelity or high price/performance ratio, but exaggerated bass, overwhelming ads and fancy appearance. This stimulated many companies without acoustic background to swarm into the field.

The earphones are manufactured in the form of OEM, and 95% of production is concentrated in mainland China, where a large number of earphone OEMs are located. The gross margin of earphone industry is extremely high, above 50% for branded earphone companies, and no less than 10% for manufacturers. Despite a high gross margin, the marketing expenditure of branded earphone companies is very large, as well as channel cost, resulting in a very low operating profit, which makes brand vendors focus on the market and contract the production to earphone manufacturers.

1. Earphone Overview

- 1.1 Classification of Earphone
- 1.2 Overview of Earphone Parameters

2. Downstream Market of Earphone

- 2.1 Global Mobile Phone Market
- 2.2 Global Smartphone Market
- 2.3 Chinese Mobile Phone Market
- 2.4 Tablet PC Market
- 2.5 Laptop Computer Market
- 2.6 Desktop Computer Market
- 2.7 Chinese Earphone Market
 - 2.7.1 China's Earphone Brand Layout
 - 2.7.2 Product
 - 2.7.3 Price

3. Earphone Industry

- 3.1 Earphone Market Size
- 3.2 Earphone Market Share
- 3.3 Relation between Brand Vendors and OEMs
- 3.4 Ranking of Earphone Vendors

4. Branded Earphone Vendors

- 4.1 Logitech
- 4.2 GN Netcom

- 4.3 Beats
- 4.4 Skullcandy
- 4.5 VTB
- 4.6 Sennheiser
- 4.7 Audio-Technica
- 4.8 Plantronics

5. Earphone OEMs

- 5.1 Fujikon
- 5.2 Merry
- 5.3 GoerTek
- 5.4 CRESYN
- 5.5 Bluecom
- 5.6 Foster
- 5.7 Foxlink
- 5.8 Z.D.L
- 5.9 Cosonic
- 5.10 Dunu
- 5.11 Innovation Technology
- 5.12 OCVACO

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