

**Global and China Voice Coil Motor (VCM)
Industry Report, 2019-2025**

Nov. 2019

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

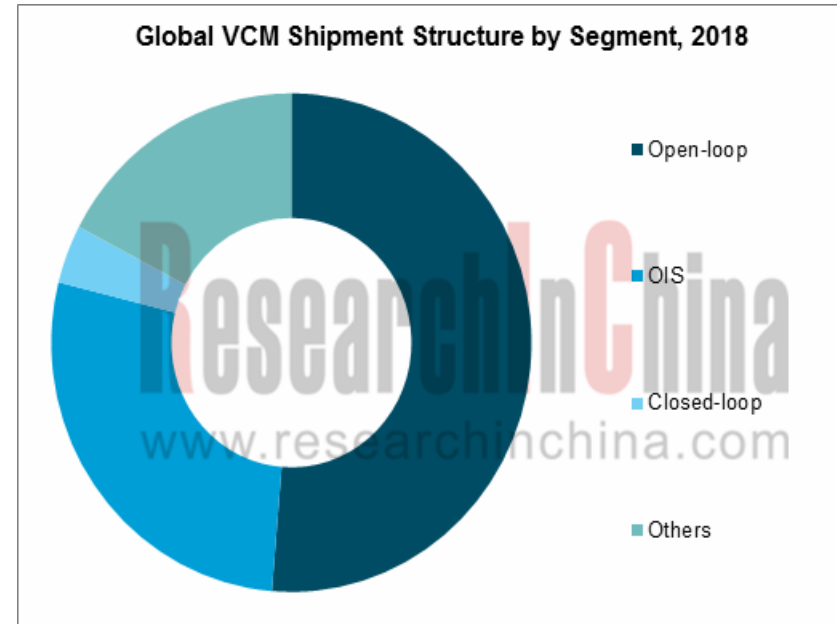
VCM (voice circle motor or voice coil actuator), a part for smartphone camera, shares around 6% of smartphone camera industry chain value.

Globally, popularity of smartphones such as those with multiple cameras conduces to the robust demand for smartphone VCMs. In 2018, roughly 1,910.7 million VCMs were consumed worldwide, including 564 million units, or 29.5% of the global total used by China.

VCM is divided into open-loop motor, closed-loop motor, center motor, optical image stabilization (OIS) motor, and OIS + close-loop six-axis motor, among which open-loop motor is used most widely and takes a lion's share in the market. OIS motors that prevail in the increasingly popular high-end smartphones, however, see a rising share in global VCM shipments, virtually 27.6% in 2018.

Among the over 100 VCM vendors worldwide, most are from Japan, South Korea and China, of which Japanese giants, typically ALPS, Mitsumi and TDK, command over 40% of the global market with state-of-the-art technologies and strong manufacturing capacity.

In 2018, Alps, Mitsumi and TDK swept a combined 40.6% shares in global VCM market, closely followed by SEMCO, Jahwa, Hozel and ZET that together made up 33.5%. Overall, Chinese peers hold the growing shares.



In the forthcoming years, global and Chinese VCM industries have the trends as follows:

1. Prevalence of dual-, triple- and quad-camera smartphones invigorates VCM industry: dual-camera smartphones get popular broadly and triple- and quad-camera ones already become available on market. Wider use of multi-camera smartphones leaves VCM industry with broad space for development. As estimated, 3,940.1 million VCMs will be consumed globally in 2025, 1,189 million units of which will be used by China.
2. OIS motor is gaining ground: having been a core technology for high precision micro cameras used in smart mobile devices, auto focus will tend to be faster, enable smaller focus modules and lower power consumption and offer better user experience on stability; VCM evolving from traditional shrapnel motor to closed-loop motor to OIS motor will be a solution to blurry pictures and make photographing and video recording more stable.
3. Chinese VCMs will take bigger shares in global market: in recent years Chinese smartphones have become more widespread around the globe. Chinese smartphone brands that grabbed a record share of 50% in 2018, are expected to share a combined 60% of the global market in 2019. They have started to use China-made VCMs massively. Chinese VCMs outperforming their foreign counterparts in cost, service and production, will thus scramble for more of the market.

Global and China Voice Circle Motor (VCM) Industry Report, 2019-2025 highlights the following:

- Global VCM industry (development status, market structure, competitive pattern, and development trends);
- China VCM industry (development status, policy and technology, and competitive pattern);
- Upstream VCM sectors (non-ferrous metal, plastic granule, etc.) and downstream VCM sectors (camera module, smartphone, etc.);
- 8 global and 12 Chinese VCM vendors (operation, VCM business, etc.).

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