

Global and China Lens Industry Report, 2010-2011

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Abstracts

Lens industry originated from Germany. So far, Germany has still been a major origin of high-end lenses. Zeiss and Leica are still the admired manufacturers, but their products rarely involve the field of consumer electronics. Zeiss ever provided designs to Nokia and Sony, but it did not offer lenses because of low profit. Moreover, the capacity of Zeiss is not so considerable. In reality, Zeiss has been focusing on healthcare and semiconductor fields.

In the field of consumer electronics lenses, China, Japan and South Korea are absolutely the major players, especially Japan enjoys overwhelming superiority. Taiwanese companies provide services mainly to Japanese customers, while Japanese companies transfer technologies to Taiwanese peers to resist the competition from South Korea and China. In a sense, Taiwan and Japan are in the same optical alliance.

Lens finds application in three varieties of consumer electronics.

First, mobile phones. Now, the prevalence rate of camera phones exceeds 85%, and the ones with 5-megapixel cameras are the mainstream. Smart phones and 3G mobile phones often have video call function, so they require two lenses, one for video call and the other for camera. One-third of smart phones boast 8-megapixel cameras. In 2011, the shipment of lenses used in mobile phones will reach 1.343 billion units, much more than that of lenses used in other consumer electronics.

Second, digital still cameras (DSC) and digital video cameras (DV). Japanese companies play a dominant role in these fields. Currently, most of DSCs and mobile phones are equipped with video clip function, beating the DV market. It is expected that, in 2011, the shipment of digital cameras will be 145 million, while that of DV will register 15 million. Low-end digital camera market is squeezed by mobile phone market, so it is in a downturn. High-end SLR (DSLR) market presents robust growth, but it is

monopolized by Canon and Nikon with over 80% market shares together.

Third, laptops, tablet PCs and Web cameras. Currently, 65% of laptops are installed with cameras, and it is expected that this proportion will be 75% in 2012. Over 95% of laptops are made by Taiwanese OEMs. Laptops mostly have 0.30-megapixel or 1.30-megapixel cameras, both of their technology and profit margins are at the low level. The cameras used in laptops are generally produced by computer peripheral equipment manufacturers, which mainly produce keyboards, mouse and PC cameras. These manufacturers include LiteOn, Chicony, Darfon, BTC, Genius, Sunrex, etc., of which Chicony ranks first among them.

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