

Research Report On China's Electronic Components and Devices Industry

<https://marketpublishers.com/r/R4316E9AF08EN.html>

Date: July 2008

Pages: 141

Price: US\$ 230.00 (Single User License)

ID: R4316E9AF08EN

Abstracts

Since 1990s, electronic information industry has become the section with the fastest growth in China's national economy. What's more, the importance of electronic components & devices manufacture also drew growing attention and now becomes the foundational section for supporting the development of electronic information industry. According to the Stat. result made by National Bureau of Statistics of China, the gross industrial output value of China now ranks the third in the world which is next only to America and Japan. The manufacturing industry of electronic components & devices has already fused in the world electronic industry division system and the foreign trade of the products presents a characteristic of international economy of "large import & large export".

According to the data released by National Bureau of Statistics of China, the total export value of China electronic products is USD 364 billion in the year 2006, of which USD 84.77 billion is contributed by the export of electronic components & devices which takes 23.3% of the total as well as a 41.7% increase over the same period of the precious year. The total import value is USD287.7 of which USD 138.683 billion, 48.2% of the total, goes to electronic components & devices with an increase of 29.5% over the same period of the previous year. It can be judged from the above that electronic components & devices are the dominating imported electronic products for China with a ratio of 1.64:1 of import to export. This probes that China has become a large consumer of electronic components & devices.

Judging from the composing of the imported products, integrated circuits and semiconductor schismatic components are important imported products, which take about 87% of the gross import value of electronic components & devices. Although domestic industry of electronic components & devices grows very fast because of the

influence of the macro economy of China, high-end products still rely on import for the reason of underdeveloped R&D ability and producing technology.

The coming seven to ten years is a key period of time for the upgrade and replacement of electronic techniques and products for both the outside world as well as China. The high speed development of information technology, the growing consumption crowd, steady increasing consumption needs and capacity in China will all benefit in the increase of consuming demand for electronic components & devices. If the prediction of Ministry of Commerce can be taken into consideration, the import of electronic products will keep its increasing pace of 23.0% in 2007, which means the import value is expected to be around USD 170.6 billion.

Judging from the location of the main consuming regions, the Pearl Delta, the Yangtze Delta and Bohai Rim, as the three main manufacture bases of electronic components & devices, are the main consuming regions.

The Pearl Delta, which is centered by Shenzhen, Dongguan, Zhongshan and Huizhou, is a labor-intensive base for export processing and assembling as well as the main manufacturing place for electronic products of consumption, computer parts and some whole machine of computers; the Yangtze Delta, pointed by Shanghai, Suzhou and Nanjing, is mainly made up by large or medium sized enterprises, of which Shanghai has formed a complete industrial chain in semiconductors including chip manufacture, design, packaging testing, equipment installation and supported services; while Suzhou is the production base in China for important electronic primary materials, computers and related products etc. The Bohai rim composed mainly by Beijing, Tianjin, Qingdao, Dalian and Jinan are currently devoted in the R&D and production of products of communication, software and household appliances etc. and is now the dominant center for electronic products and the major application market for integrated circuit in China.

For the main consumers, because electronic components & devices are the needed raw materials for electronic products, manufacturers in electronic products industry are the main consumers.

Although some adverse elements for oversea electronic components & devices to enter China market do exist, the enormous market requirements for imported electronic components & devices can not be changed. It is predicted that in the coming seven to ten years, imported electronic components & devices will keep the competitive advantages and will expand to the low-end market while keeping the share in the high-

end market.

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