

China Mobile Phone Industry Chain Report, 2006-2007

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Abstracts

The global mobile phone shipment was approximately 970 million units with a production value of about USD 79 billion in 2006. The market share of the top 9 manufacturers reached 90.72% and that of the top 5 manufacturers was 83.88%, and Nokia ranked first in terms of sales volume, reaching 347.5 million units.

This report gives a detailed analysis on the status quo and future trend for 12 parts regarding the mobile phone including platform, RF, built-in memory, display screen, PCB, configuration parts & shell, passive components, camera module and mobile phone manufacturers, etc.

This report makes a research to the representative global mobile phone manufacturers and its parts suppliers.

As for the mobile phone platform, new comers will face big competitive pressure. It is quite difficult for survival without enough shipment, while the concentration degree is rather high in mobile phone industry, and plus tier-one manufacturers and platform suppliers are working more and more closely, so there has a high threshold for new comers. But MediaTek Inc., a dark horse in mobile phone platform industry, is very fortunate for it has caught hold of such two tier-one clients as Samsung and LG, and then ascends to be one of the international first-class mobile phone platform suppliers. Unfortunately, it is just Samsung and LG selecting MediaTek as the partner that causes the decline of sales.

Mobile phone RF field basically maintains its established pattern. SKYWORKS gets very depressed in mobile phone platform field and then gives up baseband field, and now specializes in RF. As for the power amplifier for mobile phone, RFMD still stands out and controls the market alone. And in the transceiver field, Qualcomm still takes the lead while NXP turns better, and STMicroelectronics holds its firm status under the big

client of Nokia.

It shows no good signs for built-in memory of mobile phone, especially in NOR flash field. The leading company Spansion lost 90 million US dollars in the year of 2006, less than USD 285 million in 2005 but it seems no reasons to be optimistic. Spansion plans to sell factories to get through the hardship. Also, Intel had a huge loss of USD 552 million. However, the factories that specialize in NAND flash have made a considerable profit, especially Samsung and Toshiba. NOR flash manufacturers have to seek the other ways for survival in the future; otherwise, they will be purchased either by private funds or by other companies.

Mobile phone display screen is falling into the trouble of successive profit decline. TFT-LCD display screen for mobile phone has dived nearly 100% since the second half of 2005 as batch of large-size TFT-LCD manufacturers began to produce small-size display screen. Such a transfer causes a sharp rise in supply and also makes TFT-LCD become the mainstream. But as the resolution of display screen for mobile phone gets further improved, QVGA will be the mainstream. However, it is very difficult for those large-size TFT-LCD manufacturers who began to produce small-size ones to go through the technical access to QVGA in a short time, so the price of mobile phone display screen is expected to get steady and even show a re-rise.

Mobile phone PCB market is still controlled by Taiwan manufacturers and their market share has already exceeded 50% and will be over 60% by 2007. As far as the technology is concerned, there is no obvious change and high-grade HDI still takes the mainstream. Panasonic and IBIDEN have not introduced their new technologies in a wide range yet due to the high cost. In the mobile phone PCB field, rigid-flex PCB is the hotspot. Most of mobile phone PCB manufacturers mainly engage in the RPC production while FPC manufactures are relatively independent. Whereas, the application amount of FPC is much lower, so most of PCB manufacturers prefer to make the PCB business contracted. As PCB manufacturers are quite sensitive to oil price, the continued decrease in oil price will help them to make more considerable profits.

A metallization wave sweeps over mobile phone configuration parts & shell guided by V3, which means, on the one hand, the metallization in a real way for more and more aluminum and magnesium alloys handsets have appeared; and on the other hand, the metallization of plastic shell, i.e. adopting NVCM process. Compared to plastic configuration parts & shell, metal one has a log of advantages though, it has not been promoted because of the high cost. But now, the emergence of V3 has broken the

bottleneck in cost and decreased the cost. Ultra-thin mobile phone is the mainstream at present and will last a long time, and ultra-thin configuration is just the advantage what the metal material has.

There are no great changes in camera module of mobile phone. The mainstream configuration of mobile phone camera still comes to between 1.3 mega-pixels and 2 mega-pixels, but 2 mega-pixels camera is applied to high-end mobile phone and is expected to be the mainstream by 2007.

As for the mobile phone manufacturing, China is the world largest mobile phone manufacturing base and around 46.9% of world's mobile phones are made in China in 2006. Around 103 million mobile phones were sold in China's domestic market and 252.2 million were exported. Shenzhen, Tianjin, Beijing and Suzhou have become the important bases for mobile phone manufacturing, and have formed a complete mobile phone industry supply chain, especially Shenzhen. The mobile phone output is getting higher and higher in India. Basically, the assembly process for mobile phone is done there in India, but as mobile phone giants enter into Indian market successively, some matched manufacturers are planning to go there. However, as for the infrastructure and human resource, India is far enough to compare with China, so few matched manufacturers are willing to go there. As a result, India can pose no threats on China in a short term.

Contents

- 1 Brief introduction to mobile phone industry chain
 - 1.1 Brief introduction to mobile phone components
 - 1.2 Status quo of mobile phone industry chain
 - 1.3 Development trend of mobile phone industry chain
 - 1.4 Cost of mobile phone
 - 1.4.1 Cost of Bird D660
 - 1.4.2 Cost of Lenovo V800, Amoi E65 and Bird D736
 - 1.5 Market analysis of mobile phone with Ultra-low price and single chip

- 2 Mobile phone platform
 - 2.1 Brief introduction
 - 2.2 Trend in 3G era
 - 2.3 Alternative for separation or integration of baseband and application processor
 - 2.4 Status quo
 - 2.5 Major manufacturers
 - 2.5.1 EMP
 - 2.5.2 MediaTek Inc.
 - 2.5.3 Qualcomm

- 3 Mobile phone RF
 - 3.1 RF circuit structure
 - 3.2 PF semiconductor process
 - 3.2.1 GaAs
 - 3.2.2 SiGe
 - 3.2.3 RF CMOS
 - 3.2.4 UltraCMOS
 - 3.2.5 Si BiCMOS
 - 3.3 RF semiconductor in 3G era
 - 3.4 Status quo and trend of mobile phone RF industry
 - 3.5 RF manufacturers
 - 3.5.1 SKYWORKS
 - 3.5.2 RFMD

- 4 Mobile phone built-in memory
 - 4.1 Brief introduction
 - 4.1.1 Conception
 - 4.1.2 Three factions of PSRAM

- 4.1.3 CellularRAM
- 4.1.4 COSMORAM
- 4.1.5 UtRAM
- 4.1.6 Mobile SDRAM
- 4.1.7 NOR and NAND
- 4.2 Mobile phone memory market and industry status
- 4.3 Mobile phone built-in memory manufacturers
 - 4.3.1 Intel
 - 4.3.2 SPANSION
 - 4.3.3 ELPIDA
 - 4.3.4 STMicroelectronics

5 Mobile phone display screen

- 5.1 Development trend
- 5.2 Mobile phone display screen industry
- 5.3 Major mobile phone display screen manufacturers
 - 5.3.1 Samsung
 - 5.3.2 Samsung SDI
 - 5.3.3 Epson
 - 5.3.4 Hitachi
 - 5.3.5 Sharp
 - 5.3.6 Wintek
 - 5.3.7 Toppoly

6 Mobile phone PCB

- 6.1 Brief introduction
- 6.2 Recent situation of global PCB industry
- 6.3 Mobile phone PCB technologies
 - 6.3.1 HDI
 - 6.3.2 ALIVH
 - 6.3.3 FVSS
 - 6.3.4 Mobile phone rigid-flex PCB
- 6.4 Mobile phone PCB industry
- 6.5 Mobile phone PCB manufacturers
 - 6.5.1 Unimicron
 - 6.5.2 Compeq

7 Mobile phone configuration parts & shell

- 7.1 Development trend

7.2 Status quo of mobile phone metallization market

7.3 Brief introduction to related materials

7.4 Market status

7.5 Industry status

7.6 Related manufacturers

7.6.1 Green Point

7.6.2 Chicheng

7.6.3 Perlos

8 Mobile phone electroacoustic component

8.1 Brief introduction

8.2 Brief introduction to MEMS microphone

8.3 Mobile phone electroacoustic component

8.4 Industry status

8.5 Industrial manufacturers

8.5.1 Merry

8.5.2 Hosiden

9 Mobile phone passive components

9.1 Brief introduction

9.2 Development trend of MLCC

9.3 MLCC industry pattern

9.4 Industrial manufacturers

9.4.1 Murata

9.4.2 Yageo

9.4.3 Walsin

10 Mobile Phone Battery

5.1 Brief introduction

10.1.1 Liquid li-ion battery

10.1.2 Polymer li-ion battery

10.2 Mobile phone battery industry pattern

10.3 Mobile phone battery industry pattern in mainland China

10.4 Manufacturers

10.4.1 BYD

10.4.2 Samsung SDI

10.4.3 Sanyo Energy

10.4.4 LG Chem

- 11 Mobile phone camera module
 - 11.1 Brief introduction
 - 11.2 Lens manufacturers
 - 11.2.1 Assembly technology of mobile phone camera module
 - 11.2.2 Assembly manufacturers
 - 11.3 Mobile phone camera module industry and its market development trend
 - 11.4 CMOS sensor manufacturers
 - 11.4.1 Omnivision
 - 11.4.2 Micron
 - 11.4.3 Magnachip
 - 11.5 Mobile phone camera module lens manufacturers
 - 11.5.1 Genius
 - 11.5.2 Largan Precision
 - 11.5.3 Asia Optical
 - 11.5.4 Kinko Optical
 - 11.5.5 Enplas

- 12 Mobile phone manufacturers
 - 12.1 Mobile phone brand manufacturers
 - 12.1.1 Samsung
 - 12.1.2 SonyEricsson
 - 12.1.3 Nokia
 - 12.1.4 LG
 - 12.1.5 Motorola
 - 12.1.6 BenQ
 - 12.1.7 Bird
 - 12.1.8 TCL
 - 12.1.9 Lenovo
 - 12.1.10 Konka
 - 12.1.11 Sharp
 - 12.1.12 Yulong
 - 12.2 OEM and ODM manufacturers
 - 12.2.1 HTC
 - 12.2.2 Compal
 - 12.2.3 Arima
 - 12.2.4 Foxconn
 - 12.2.5 Flextronics
 - 12.2.6 ELCOTEQ

Tables/Figures

Industry chain model of international mobile phone manufacturers
Basic structure of mobile phone
Consumption of applications to DMIPS
ARM's forecast of development orientation of MODEM
Brief introduction to ARM1156
Global baseband market scale, 2004-2008
Forecast of market share of major manufacturers in 2.5G GSM mobile phone platform market, 2006
Market share of major Chinese baseband manufacturers, 2006
EMP product roadmap
Operating revenue and gross margin of MediaTek, 1999-2005
Operating revenue and yr-on-yr growth of MediaTek, Jan-Nov 2006
After-tax returns in 12 successive quarters of MediaTek
Organizational structure of MediaTek
Application block diagram of MT6218B
Interior block diagram of MT6218B
Memory management of MT6218B
Interior block diagram of MT6219
Regional revenue structure of Qualcomm, FY2004-FY2006
Revenue statistics of chip department of Qualcomm in 5 successive fiscal years
Chip shipment and market share in CDMA of Qualcomm, FY2002-FY2006
Baseband product roadmap of Qualcomm
Single-band UMTS chip development roadmap of Qualcomm
Triple-band UMTS chip development roadmap of Qualcomm
Block diagram of typical RF of wireless terminal units
Process flow of typical RF components of wireless communication units
Comparison among HBT, PHEMT and MESFET
Comparison of frequency spectrum of 2.5G, 2.75G and 3G signals
Market share statistics of global market of power amplifier for mobile phone, 2006
Market share statistics of global market of transceiver for mobile phone, 2006
Revenue of SKYWORKS, FY2002-FY2006
Statistics and forecast of core business revenue of SKYWORKS, FY2003-FY2007
Statistical and forecasted operating profit of SKYWORKS, FY2003-FY2007
Future strategies of SKYWORKS
SPA/FEM shipment and main clients of SKYWORKS, FY2003-FY2006
Key orders of SKYWORKS

Mobile platform strategies of SKYWORKS
Operating Revenue of RFMD, FY2002-FY2006
Profit of RFMD, FY2002-FY2006
Development roadmap of built-in memory of mobile phone
Comparison among CellularRAM, MobileSDRAM and PSRAM
Characteristics of CellularRAM
Statistics and forecast of memory shipment of mobile phones, 2005-2010
Market share of major mobile phone memory manufacturers worldwide, 2006
Revenue and profit of flash memory department of Intel, 2005Q4-2006Q4
Characteristics of flash memory of Intel
Sketch map of MirrorBit
Product structure of Spansion
Structure of revenue from mobile phone display screen by technology, 2005Q1-2006Q4
Market shares of mobile phone display screen manufacturers worldwide
Market shares of mobile phone TFT-LCD manufacturers worldwide
Market shares of mobile phone CSTN-LCD manufacturers worldwide
Market shares of mobile phone MSTN-LCD manufacturers worldwide
Quarterly shipment of small-size display screen of Samsung, 2004Q2-2006Q4
Sales revenue and operating profit margin of Samsung SDI, 2005Q2-2006Q3
Investment proportion of Samsung SDI by field, 2007
Investment in R&D personnel of Samsung SDI by field, 2007
Investment in R&D of Samsung SDI by field, 2007
Shipment and average sales price of small-size display screen of Samsung SDI, 2005Q4-2006Q3
Statistics and forecast of revenue proportion and structure of Samsung SDI, 2000, 2005 & 2010
Type and structure of small-size display screen products of Samsung SDI, 2005Q4-2006Q3
Focus of Samsung SDI on mobile display business
Development plan of Samsung SDI on active OLED
Mobile phone display screen products of Epson
Roadmap of production capacity expansion of system LCD of Sharp
Revenue proportion and structure of Wintek
Production value statistics of PCB by technology worldwide
Production value statistics of PCB by region worldwide
Monthly shipment growth rate of FPC and traditional PCB worldwide, Jan 2003-Oct 2006
Monthly BOOK/BILL ratio of FPC industry, Jan 2004-Aug 2006
Statistics and forecast of production value of global FPC industry

Regional output of global FPC industry by production value, 2002-2007
Production value and growth rate of Taiwan FPC industry, 2002-2005
Sketch map of FVSS
Market shares of global major mobile phone PCB manufacturers, 2006
Statistics and forecast of top 3 Taiwan-based mobile phone PCB manufacturers, 2003Q1-2006Q4
Factory distribution and business profile of Unimicron
Mainstream mobile phones using metal shell, 2006H2
Statistics and forecast of price of mobile phone shell (front and back cover), 2003-2008
Statistics and forecast of price of mobile phone configuration parts, 2003-2008
Statistics and forecast of shipment of mobile phone configuration parts & shell, 2003-2008
Market share of global major mobile phone configuration parts & shell manufacturers, 2006
Statistics and forecast of revenue, gross profit and profit of Green Point, 2006Q1-2007Q4
Statistics and forecast of revenue proportion and structure of Green Point, 2006Q1-2007Q4
Statistics and forecast of revenue and gross profit of Chicheng, 2006Q1-2007Q4
Statistics and forecast of revenue proportion and structure of Chicheng, 2006Q1-2007Q4
Latest mobile phone products of Chicheng
Sales Revenue of PERLOS, 2001-2006
Human resource distribution of PERLOS by region, 2006
Plant area distribution of PERLOS by region, 2006
Statistical and forecasted Shipment of mini speaker and telephone receiver (microphone) worldwide, 2003-2008
Statistical and forecasted shipment of global hand-free mobile phone headphones and Bluetooth earphone market, 2003-2008
Revenue statistics of HOSIDEN, FY2002- FY2006
Product application structure of HOSIDEN, FY2006
Sales Revenue and profit of Murata, 2005Q2-2006Q4
Revenue structure of Murata, 2005Q2-2006Q4
Revenue structure of Murata, FY2002- FY2006
Product application structure of Murata, 2005Q2-2006Q4
Product application structure of Murata, FY2002- FY2006
Revenue structure of Murata by region, 2005Q2-2006Q4
Revenue structure of Murata by region, FY2002- FY2006
Sales revenue of Murata Beijing, 1997-2005

Product application structure of Yageo, 2006
Quarterly production capacity of chip resistor and MLCC of Yageo, 2005Q1-2006Q4
Quarterly utilization rate of production capacity of chip resistor and MLCC of Yageo, 2005Q1-2006Q4
Structure of Walsin
Production capacity change of MLCC of Walsin, 2000-2006
Product structure of Walsin, 2006
Production capacity change of chip resistor of Walsin, 2000-2006
Liquid Li-ion battery manufacturing process flow
Structure of prismatic polymer Li-ion battery
Polymer Li-ion battery manufacturing process flow
Regional market share of lithium battery worldwide
Quarterly shipment of Li-ion battery cell makers, FY2004-FY2006
Revenue structure of BYD, 2004-2006H1
Regional revenue structure of BYD, 2006H1
CMOS mobile phone camera module industry chain
Mobile phone camera module manufacturing process flow
Market shares of global major CMOS sensor vendors, 2006
Principle of CSP integration process
Principle of COB integration process
Market shares of camera module integrators, 2005H1
Product application structure of Omnivision, 2007Q2
Revenue of Omnivision, 2004Q1-2007Q2
Revenue and gross margin of Micron, 2006Q1-2007Q1
Expense spent on R&D, marketing and management of Micron, 2006Q1-2007Q1
Product department structure of Micron
Quarterly mobile phone shipment of Samsung, 2005Q1-2006Q4
Mobile phone shipment of Samsung by region, 2005-2006
Revenue and before-tax profit margin of Sony Ericsson, 2005Q2-2006Q4
Mobile phone shipment and average price of Sony Ericsson, 2005Q2-2006Q4
Mobile phone sales revenue and before-tax profit margin of Sony Ericsson, 2005Q2-2006Q4
Shipment and average price of Sony Ericsson, 2005Q2-2006Q4
Quarterly mobile phone shipment of LG, 2005Q4-2006Q4
Quarterly mobile phone sales revenue and operating profit of LG, 2005Q4-2006Q4
Mobile phone sales revenue and operating profit of Motorola, 2006
Mobile phone shipment and market share of Motorola, 2006Q1-2006Q4
Framework of mobile department of BenQ
Revenue structure of BenQ by division, 2004Q4-2006Q3

Statistics and forecast of product revenue structure of HTC, 2006Q1-2007Q4
Revenue and gross margin of HTC, 2000-2006
Structure of Compal
Statistical and forecasted operating revenue and profit margin of Compal Communications, 2001-2006
Organizational structure of Arima Communications
Global pattern of Arima
Product roadmap of Arima Communications
Statistical and forecasted revenue and gross margin of Arima Communications, 2001-2006
Shipment and average sales price of Arima Communications, 2005Q1-2006Q4
Investment structure of Arima Communications in mainland China
Performance comparison among Si BJT, SiGe HBT, RF CMOS, Bi CMOS, MES FET, PHEMT, GaAs HBT
Comparison among 2.5G, 2.75G and 3G in RF
Comparison among 2.5G, 2.75G and 3G in RF frequency
Comparison among 2.5G, 2.75G and 3G in requirements for RF system
Sales revenue and gross margin of Spansion, 2004Q4-2006Q4
Wafer plants of Spansion
Seal and test plants of Spansion
Mobile phone display screen products of Samsung
Small-size display screen products of Sharp
Product lines of Wintek
Demands of different types of electronic products for HDI multilayer PCB
Production capacity and clients of Taiwan top 3 mobile phone PCB manufacturers
Characteristics comparison of mobile phone shell materials
Estimated global demands for magnesium alloy used in mobile phone
Estimated global demands for aluminum alloy used in mobile phone
Financial results forecast of Green Point, 2006
Supply chain of electroacoustic components of major mobile phone manufacturers
Proportion of three products of Merry, 2005-2007
Client structure of Merry
Relationship of CMOS image sensor IC with wafer plants
Responsibilities of all the departments of HTC
Main raw material providers of Arima Communications
Statistics and forecast of annual production capacity of Arima Communications, 2004-2007

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