

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.

Contents

1 OVERVIEW OF LENS INDUSTRY

- 1.1 Introduction to Lens
- 1.2 Industry Chain

2 LENS MARKET

- 2.1 CMOS Camera Lens
- 2.2 PC and Laptop
- 2.3 Mobile Phone
 - 2.3.1 Global Market Size
 - 2.3.2 Smart Phone
 - 2.3.3 China Mobile Phone Industry
- 2.4 DC Market and Industry
 - 2.4.1 China DC Industry
 - 2.4.2 DC OEM

3 LENS INDUSTRY

- 3.1 Precision Optical Components
- 3.2 Lenses Used in Cameras of Mobile Phones
- 3.3 Lenses Used in Cameras of Laptops and Tablet PCs
- 3.4 Ranking of Lens Manufacturers

4 MAJOR LENS MANUFACTURERS

- 4.1 Panasonic (Sanyo)
- 4.2 Nikon
- 4.3 Canon
- 4.4 Ability Enterprise
- 4.5 Altek
- 4.6 Honhai
 - 4.6.1 Champ Technology Optical
 - 4.6.2 Premier Foshan
 - 4.6.3 Fu Jing Precision Industry Jincheng
- 4.7 Diostech
- 4.8 Sekonix

- 4.9 Kolen Optical
- 4.10 Phenix Optical
- 4.11 Largan
- 4.12 GSEO
- 4.13 Asia Optical
- 4.14 Kinko
- 4.15 Newmax
- 4.16 Excellence Electro-Optical
- 4.17 Sunny
- 4.18 Tamron
- 4.19 Fujifilm
 - 4.19.1 Fujinon
- 4.20 Glory
- 4.21 Hokugang
- 4.22 KMOT
- 4.23 Youngoptics
- 4.24 Kantatsu
- 4.25 Zeiss
- 4.26 Samsung Opto-Electronics

Selected Charts

SELECTED CHARTS

Glass Lens Production Process

CMOS Sensor Shipment, 2010-2014E

Shipment of CMOS Camera Modules in Downstream, 2009-2011

Shipment of CMOS Camera Modules by Pixel, 2009-2011

Global Sales Volume of Desktops and Servers, Q1 2010-Q4 2011

Global Sales Volume of Laptops and Tablet PCs, Q1 2010-Q4 2011

Global Mobile Phone Shipment, 2007-2014E

Quarterly Global Mobile Phone Shipment and Annual Growth Rate, Q1 2008- Q1 2011

Quarterly Shipment of CDMA and WCDMA Mobile Phones, 2007-2011

Market Shares of Major Smart Phone Manufacturers in the World, Q1 2011

Mobile Phone Export Volume and Growth Rate in China, 2000-2010

Mobile Phone Export Value and Growth Rate in China, 2002-2010

Mobile Phone Export Volume and ASP in China, 2002-2010

Shipment of DC, 2004-2011E

Size of Global Precision Optical Components Market, 2007-2012E

Downstream Distribution of Global Precision Optical Components Industry, 2011

Geographical Distribution of Global Precision Optical Components Market, 2011

Taiwan's Precision Optical Components Market Size, 2007-2012E

Downstream Distribution of Taiwan Precision Optical Components Industry, 2011

Revenue and Operating Margin of Nikon, FY2006-FY2011

Revenue of Nikon by Division, FY2008-FY2011

Nikon's Camera Shipment by Type, FY2010-FY2012

Revenue and Operating Margin of Canon, FY2006-FY2011

Revenue of Canon by Division,, FY2008-FY2011

Revenue and Gross Margin of Ability Enterprise, FY2006-FY2011

DSC Shipment of Ability Enterprise, 2007-2012E

Revenue and Gross Margin of Altek, 2006-2012E

Organizational Structure of DIOSTECH

Production Lines of DIOSTECH

Customers of DIOSTECH

Revenue of SEKONIX by Product, 2009-2011

Revenue of SEKONIX by Pixel, 2008-2014

Route of Korea Optical

Revenue and Gross Margin of GSEO, 2005-2011

Revenue and Operating Margin of GSEO, 2005-2011

Monthly Revenue of GSEO, Jul. 2009-Jul. 2011
Revenue of GSEO by Pixel, 2009-2011
Shipment of GSEO by Pixel, 2009-2011
Revenue of GSEO by Pixel, Q1 2009-Q2 2010
Revenue and Gross Margin of KINKO, 2007-2012E
Monthly Revenue of KINKO, Jul. 2009-Jul. 2011
Revenue and Gross Margin of NEWMAX, 2007-2012E
Revenue of NEWMAX by Product,, Q1 2010-Q4 2011
Revenue and Gross Profit of EXCELLENCE Electro-Optical, 2006-2011
Monthly Revenue of EXCELLENCE Electro-Optical, Jul. 2009-Jul. 2011
Equity Structure of SUNNY
Major Customers of SUNNY
Capacity Utilization of SUNNY, 20008- Q1 2011
Presence of SUNNY's Factories
Revenue of SUNNY by Product, 2008-2010
Revenue of SUNNY by Application, 2008-2010
Revenue and Operating Margin of TAMRON, Q1 2009-Q2 2011
Revenue and Operating Margin of Fujifilm, FY2004-FY2011
Revenue of Fujifilm by Division, FY2008-FY2010
Revenue and Gross Margin of GLORY, 2006-2011
Monthly Revenue of GLORY, Jul. 2009-Jul. 2011
Monthly Revenue of Hokuang, Jul. 2009-Jul. 2011
Revenue of KMOT by Product, FY2010-FY2011
Revenue and Gross Margin of Young Optics, 2006-2011
Revenue of Young Optics by Product, H1 2008-H1 2011
Revenue and EBITDA Ratio of ZEISS, FY2006-FY2011
Revenue of ZEISS by Division, FY2010
Consumer Optics/Optronics Revenue and Employees of ZEISS, FY2006-FY2010
Market Shares of DC Brands in the World, 2009-2011
Export of DC Production Places in China, 2009-2010
Output of Major DC Manufacturers in China, 2009-2011
Customers of DC OEMs
Shipment of Major Mobile Phone Camera Lens Manufacturers in the World, 2009-2011
Shipment of Major Mobile Phone Camera Lens Manufacturers and Their Major Clients in China, 2011
Shipment of Camera Lenses Used in PC Cameras, Laptops, Game Consoles and Tablet PCs of Major Manufacturers in China, 2011
Ranking of Major Lens Manufacturers by Revenue in the World, 2009-2011
Gross Margin of Major Lens Manufacturers, 2009-2011

Financial Data of Hon Hai's Main Subsidiaries in Optics Field, 2010
Revenue and Operating Income of Korea Optical, 2007-2010
Average Price of Mobile Phone Lenses, 2009-2011
Capacity of Sunny, 2007-H1 2010
Revenue, Gross Profit and Operating Income of Hokuang, 2006-2010

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