

Global and China Micro Electronic-Acoustics Component Industry Report, 2013-2014

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Abstracts

The report highlights the followings:

1. Introduction to Micro Electronic-Acoustics System
2. Downstream Market of Micro Electronic-Acoustics
3. Micro Electronic-Acoustics Industry
4. 21 Micro Electronic-Acoustics Enterprises

The micro electronic-acoustics industry began to deteriorate in the second half of 2013, reflecting a broad decline in gross margin and average selling price of products except earphone and headphone. The industry leader–AAC has accidentally suffered downdrafts entering 2014 for several reasons: it is impossible for the mobile phone market including the smartphone market to reproduce high growth, and China's smartphone market shows signs of decline. According to data released by China Academy of Telecommunication Research of MIIT, the domestic mobile phone market accumulated shipments of 293 million units in January-August 2014, down 24% as opposed to 396 million units a year earlier, including 254 million smartphones (down 11.3% yr-on-yr). Besides, the tablet PC market apparently stopped growing e.g. a slowdown in iPad shipments, in contrast to the slightly improved laptop computer market.

On the other hand, the micro electronic-acoustics industry amid intensified competition has created space for generous profits in the transfer process from manual to automatic, and players have now completed the layout of automatic production lines, leading to non-existence of potential for cost reduction. Nowadays, mobile phone competition focuses on thickness, CPU, screen and camera, less concerned about sound performance, whose improvements depend on earphone rather than the phone

itself, thus vendors prefer to adopt cheap electro-acoustic components.

In the field of micro electromechanical system (MEMS) microphone, large MEMS foundries or IDMs provide cheap MEMS dies which causes a drastic drop in MEMS microphone prices. The fierce price war has brought a rare loss for Knowles, not to mention other companies.

Mobile phone audio frequency is developing towards integration, speaker/receiver is firstly integrated into speaker modules, then box, and now equipped with function of LDS antenna. Then there is microphone mounted on FPC which enables flexibility for addition of multiple FPCs to mobile phones, simplifies circuit board design, improves stability and reduces thickness. All audio frequency components in a mobile phone may be integrated into a module in the future to bring the price down.

Micro electro-acoustic vendors have intensified efforts to develop non-electro-acoustic products to compensate for the decline in performance, but the huge initial investment is a burden to the overall gross margin. As the only highlight in electro-acoustics, headphones even those priced above USD100 won the broad market following the popularity of expensive phones such as iPhone, so did China's bluetooth headphone in the wake of booming auto sales. Merry, Cresyn and GoerTek best represent companies prosperous in the headphone business.

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