

Wireless Communications

Mobile Handset Market Tracker

By Tina Teng, Francis Sideco and Jagdish Rebello

Forecast**Frequency, Time Period**

- 5-year annual + 2-year history
- Current quarter plus 2-year history for mobile handset market shares

Measures

- Factory Unit Shipments
- Factory ASPs
- Factory Revenues
- Semiconductor Content
- Semiconductor Revenues
- ASP Trend by Leading OEMs

Regions and Markets Covered

- North America
- Latin America
- EMEA
- China
- Rest of Asia

Detail Level

- Major Cellular Standards
- Handset Type
- Handset Features
- Semiconductor by Major Functional Area
- Semiconductor Type

Applications/Products Covered

- Mobile Handsets

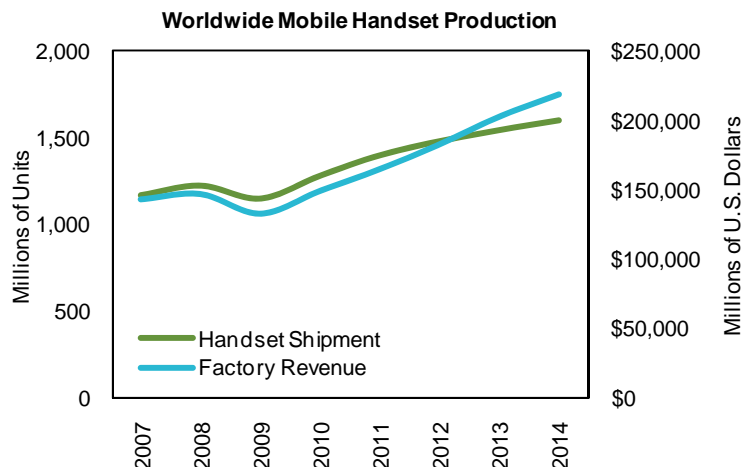
Technologies Covered

- Baseband ICs
- RF ICs
- Power Amplifiers

The mobile handset industry in 2011 is expected to grow by 12% in terms of unit shipments. In 2010, global mobile handset unit production contracted by 6.7% during the recession. Worldwide factory revenue from production of mobile handsets will reach \$218.6 billion in 2014 up from \$132.6 billion in 2009 and \$148.9 billion in 2010. iSuppli still expects the industry to have 6.8% 5-year CAGR in 2009 in volume shipment.

The smartphone market has become manufacturers' new focus for greater profit. In 2009, despite the depressing industry contraction, smartphone market has grown 12.3% to 182 million units because of the upgrade sales in developed market, promotions and the pull from mobile applications. The new device sales have not yet lost its momentum due to the rapid addition of new subscribers in the emerging markets of Asia, Africa and Latin America. This presents unique opportunities to different players in the dynamic mobile handset value chain.

The players in the mobile handset industry are challenged. Vertical integration is observed among handset manufacturers, and OS providers. Mobile handset manufacturers in turn need to design handsets that not only support new services, but also offer additional functionality and features that further propel consumers into upgrading. Semiconductor providers need to develop solutions that support new services and features in handsets, while at the same time streamlining and cost reducing their solutions.

**Key Issues Addressed:**

- What is going to drive subscriber growth and mobile handset shipments over the next five years?
- Who are the key mobile handset OEMs and how is the competitive landscape changing?
- What features will penetrate handsets and what is the impact on handset designs and semiconductor content?
- What effect will next generation standards and additional features and functionality have on mobile handset average selling prices?

Applicable To:

- Mobile Handset OEMs, EMS and ODMs
 - Purchasing
 - Strategic Marketing
- Semiconductor/Component Suppliers
 - Product Management
 - Strategic Marketing
- Financial Community

Lead Analyst**Tina Teng, Senior Analyst**

At iSuppli, Tina is responsible for analysis and forecasting the mobile handset market.

Prior to joining iSuppli, Tina worked for Texas Instruments and MCI WorldCom. At Texas Instruments her main focus includes competitors benchmarking and database analysis. While working for MCI Worldcom as a data network engineer, Tina was responsible for test plan design, network testing as well as network management and integration.

Tina earned a Master of Science degree in Electrical Engineering from University of Texas at Dallas with concentration in Telecommunications and an MBA from the University of Texas at Austin.

Jagdish Rebello PhD, Principal Analyst

Jagdish focuses on research and competitive analysis of various wireless and optical broadband access and networking communications including WLAN and WiMAX. He also provides analysis on wireless infrastructure, emerging optical wireless technologies and cellular subscriber dynamics.

Prior to iSuppli, Jagdish was a Product Manager for several photonic components at ADC Telecommunications. He also managed the optical spectroscopic detector line for Jobin Yvon, Inc.

Jagdish has a PhD and MS in mechanical engineering from Ohio State University, an MBA in finance and marketing from Rutgers University, and a BS in mechanical engineering from the University of Bombay.

Francis Sideco, Senior Analyst

Francis is a senior analyst with the iSuppli wireless research team and is responsible for iSuppli research into the semiconductor market for mobile handsets, mobilized non-handset devices, Wide Area Network access technologies and other wireless markets including Personal Area Networks and Local Area Networks. Francis is also responsible for leading iSuppli's research in RF components for wireless handsets.

Francis comes to iSuppli from Comarco Wireless Test Solutions where he was a Product Marketing Manager. At Comarco, Francis was responsible for strategic product direction, product management and product marketing worldwide.

Francis received a Bachelor of Science in Electrical Engineering from Loyola Marymount University.

Sample Table of Contents**Executive Summary**

- Significant Findings

Cellular Subscribers

- Multiple Devices Per Subscriber

Standards

- GSM/GPRS
- EDGE
- W-CDMA
- CDMA2000 1x and EV-DO
- TD-SCDMA
- 3.5G
- 4G

Regional Variations

- Europe
- Japan
- China
- Asia-Pacific
- Americas

Mobile Handset Shipments

- Form Factor
- Displays
- Cameras
- Connectivity Features
- Multimedia Features
- Navigation
- Mobile TV
- Smart Phones

Mobile Handset OEMs**Semiconductor Market Forecast****Semiconductor Suppliers to the Mobile Device Market****Semiconductor and Component**

- Trends
 - RF Architectures and Technologies
 - Baseband Processors, Coprocessors, and Application Processors

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