

A/V Accessories



June 2009 US\$495



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A/V ACCESSORIES

Supplier capability in China

EXECUTIVE SUMMARY

China's A/V accessories industry is one of the most dynamic, sustained by the growing application range and the diversity of the selection. Exports are buoyed by the popularity of portable entertainment and multimedia devices.

Companies expect an upturn in overseas business despite forecasts that demand is likely to dip. To achieve this, they are strengthening their position in traditional markets and exploring non-EU, Middle East and Asia countries.

China suppliers continue to leverage their price advantage over foreign companies to counteract the effects of the current financial slump. The strategy is crucial as production is concentrated on the low-end and midrange segments, where competitive quotes are preferred.

To beef up margins, many companies are moving toward high-end models or diversifying to related products.

Others are increasing their capacity for the domestic front.

The selection available is composed of electronic and nonelectronic products. The former continue to be the mainstream, accounting for about 70 percent of the country's turnout.

Maturing technologies and consolidated supply chain facilitate R&D for the entire range. Contemporary designs and multifunctionality are underscored across all types.

Much of the product development in this line is on accessories for iPods and MP3 and MP4 players, which dominate the line.

Audio performance and compatibility are the priorities of iPod accessories makers, particularly those that produce speakers.

Suppliers for the MP3 and MP4 player line, specifically portable speakers, highlight enhanced sound quality.

The following are some of the key trends observed in China's A/V accessories industry:

- Although price competition remains the industry's biggest challenge, many suppliers raised their quotes to boost revenue.

- The majority, however, limited adjustments to less than 5 percent. Those that opted to implement reductions did so by as much as 4 percent.

- To enhance competitiveness, some suppliers are increasing their R&D investment in efforts to release more innovative units.

- Even as they undertake product quality upgrades, companies are keeping to their cost reduction thrust by improving operating efficiency.

- Makers are locking in prices based on the time orders are placed to help them recoup losses from the economic downturn.

- Some suppliers have adopted realtime settlements for US dollar-denominated transactions.

- Large enterprises are keen to acquire core technologies in a bid to develop components in-house and keep outlay manageable.

This report covers accessories for iPods, MP3 and MP4 players, and turntables; TV stands and wall mounts; CD/DVD cases and holders; video glasses; earphones; and cleaning implements. The supplier survey was conducted on manufacturers of these products.

The Industry Overview section discusses developments in China's supply market. It also mentions key trends and product development priorities in coming months.

China has more than 1,000 suppliers of all types of A/V accessories. Most of them are manufacturers that have high export percentage.

Most companies are in the cities of Shenzhen, Huizhou, Dongguan and Zhongshan in Guangdong province.

In this report

- 26 in-depth company profiles
- 89 additional suppliers
- 116 top-selling export products
- Supplier demographics
- Supplier survey
- Industry statistics & charts

METHODOLOGY

To produce this report, Global Sources surveyed a wide range of suppliers. Rather than focus simply on high-profile makers, we compiled a representative sample of large, midsize and emerging manufacturers. All profiled companies are export-oriented professional suppliers that may or may not be clients of Global Sources.

The selection of suppliers is designed to reflect the composition of the industry in China in terms of geographic spread, business type and company ownership.

For in-depth company profiles, our research teams interviewed senior executives and export managers who discussed their recent performance and provided price, R&D, production and export forecasts for the next 12 months. The interviews were done in person, by phone or e-mail. In each case, companies were required to answer specific questions designed to verify their manufacturing and export credentials, including their production and export statistics, and a breakdown of exports by product type and market. Our production checklist details the product-specific manufacturing capability of each supplier.

All profiled suppliers participated in a survey designed to provide insight into product and price trends, and challenges facing the industry. All survey questions are single choice. Results were calculated based on the actual number of valid responses to each question.

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Published by Publishers Representatives Limited (on behalf of Trade Media Limited)
4th Floor, Century Yard, Cricket Square, Elgin Avenue, P.O. Box 32322 SMB, George Town, Grand Cayman, Cayman Islands
c/o 22/F Vita Tower, 29 Wong Chuk Hang Road, Aberdeen, Hong Kong

ISBN 978-988-8004-79-9

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INDUSTRY OVERVIEW

China is one of the world's top production centers for A/V accessories. The industry is composed of at least 1,000 makers mostly engaged in mixed production.

Output is generally low end to midrange, although many suppliers are now focusing on upscale models or shifting to related lines to bolster margins.

Electronic accessories continue to be the mainstream as they have in previous years. This type makes up about 70 percent of the country's A/V accessory turnout. The rest are nonelectronic items.

The selection consists primarily of both types of accessories for iPods and MP3 and MP4 players.

Remote controls, video glasses, TV stands and wall mounts are likewise included. Cases and cleaning supplies also loosely fall under the A/V accessories category.

The country's MP3 and MP4 accessories industry has experienced considerable growth in the past five years, buoyed by robust sales of portable media players or PMPs.

Worldwide exports of these devices are likely to jump from 221 million

units in 2008 to 231 million this year, according to media sources. The in-car electronics sector will keep the line afloat at least in the next six months.

Leading the MP3 and MP4 accessories segment are earphones and FM transmitters. Many companies also make portable speakers, USB connectors, cable assemblies, chargers and nonelectronic items.

Suppliers of iPod accessories, meanwhile, noted a slowdown in orders in the last six months of 2008. They are optimistic that the market will pick up following strong demand for iPods. Robust sales of iPods and iPhones have pulled up Apple's profit to \$1.21 billion as of April 2009.

China-made iPod accessories include docking stations, earphones, chargers and cable assemblies. Companies also offer nonelectronic items such as cases, skins and pouches.

Demand for all product types is expected to take a slight downturn this year due to the current economic environment. Among the factors behind this deceleration are high costs, intense competition and IPR issues.

The wide scope of products, however, ensures sustainability.

Supplier summary

Suppliers surveyed	26
Export sales	\$155.2mn
Export ratio	87%
OEM business	56%
Capacity utilized	57%
Annual R&D spending	\$14.2mn
Full-time employees	15,075

Data: All surveyed suppliers

Production centers

Most A/V accessory suppliers in China have factories in Guangdong province, China's electronics and components powerhouse. Private companies have congregated in the area and most are large-scale manufacturers.

The cities of Shenzhen, Huizhou, Dongguan and Zhongshan are the busiest manufacturing bases. Makers subcontract plastic-injection molding, mold making and SMT to nearby EMS companies.

The province is a thriving sourcing hub for materials as well. Magnets, copper wires and plastic are some of the key parts that are available.

Guangdong boasts a mature supply chain for speaker components, LEDs, LCD panels, buttons and connectors.

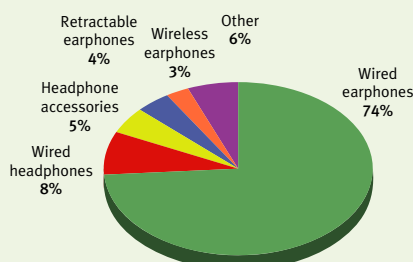
Global Sources online metrics

Headphones

Online metrics are taken from buyer and supplier activity in the featured product group on www.globalsources.com in the month preceding publication of this update.

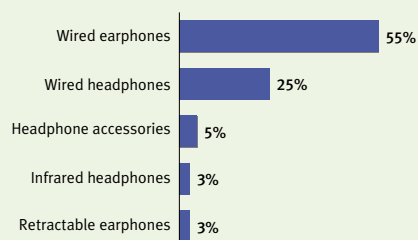
- **Buyer requests** track total inquiries from our worldwide community of more than 800,000 buyers.
- **Product profiles** represent the total number of unique products available from suppliers in our online catalogs.
- **New product postings** indicate the number of new product profiles added by suppliers during the period.

Top buyer requests

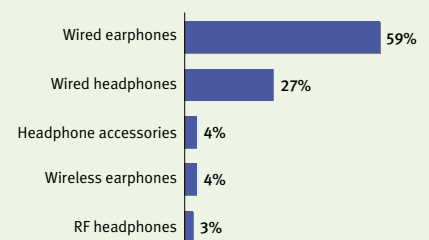


Percent of all online activity for this product group

Top product profiles



Top new product postings



Honinn Technology Co. Ltd

Honinn is a Taiwan-invested manufacturer of A/V accessories based in Dongguan, Guangdong province. Established in 2001, it specializes in iPod chargers and produces 200,000 units per month. Sales from the line amounted to \$3 million last year.

Honinn operates a 6,000sqm factory with 300 workers. The facility is currently running at full capacity. All its output is exported, mainly to the Asia-Pacific region, particularly Japan. Europe and North America also absorb a significant volume of shipments. Some of the major

customers are Brookstone of the US, Maplin and Logic3 of the UK, Sigma and Protek of Japan, Strax of France, Master Choice of Mexico, and iWorld of Singapore.

The company invests 3 percent of revenue in R&D annually, with 10 personnel handling product design and development. It holds a patent for its dual-USB travel charger and has a pending one for its quad-USB travel charger.

The supplier plans to increase its annual capital expenditure by up to 50 percent.

Company facts

Year established	2001
Business type	Manufacturer
Company ownership	Taiwan-invested
Head office location	Taipei (Taiwan)
Number of factories	1
Factory location(s)	Dongguan (Guangdong)
Total factory area	6,000sqm
No. of full-time employees	300
No. of R&D/design staff	10
No. of QC staff	30
Annual sales (all products)	\$3.0mn
Annual R&D spending	\$80,000
ISO certification	Yes

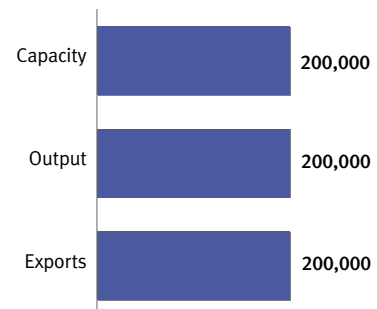
Sales & output: A/V accessories

Annual sales	\$3.0mn
Share of total sales	100%
Annual export sales	\$3.0mn
Total monthly capacity	200,000 units
Average monthly output	200,000 units
Capacity utilized	100%
Average monthly exports	200,000 units
Export ratio	100%
OEM % of exports	75%
ODM % of exports	20%
OBM % of exports	5%
Major customers	Brookstone (US); Maplin, Logic3 (UK); Sigma, Protek (Japan); Strax (France); Master Choice (Mexico); iWorld (Singapore)

Profile

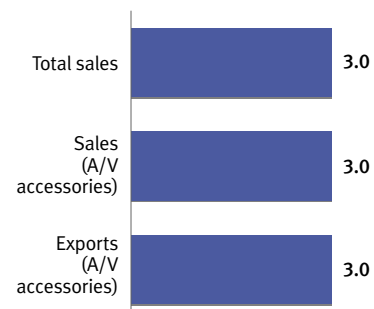
Production

units/mth



Sales

\$mn/yr



Contact details

Business contact

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Capability

Production checklist

Mold making	Yes
Plastic injection	Yes
Silkscreen/offset printing	Yes
Cosmetic design	Yes
Final assembly	Yes
QC/QA testing	Yes

Exports by product

iPod accessories	100%
MP3 & MP4 player accessories	—
Other accessories	—

Exports by market

North America	15%
European Union	25%
Europe (non-EU)	—
Asia-Pacific	60%
Middle East	—
Other	—

Survey

- **Export prices**
Stayed the same
- **Export sales**
Increase 10-20%
- **Target market**
European Union
- **Capital expenditure**
Increase up to 50%
- **Major challenge**
Design copying/piracy
- **Export capability**
Shorten design/development time
- **R&D focus**
Integrate value-added features

Popular export models



iPod accessory

Model	H28B-4X
Minimum order	2,000 units
Packaging type	Blister
Delivery time	20 days
Indicated price	\$4.50

Description: 4-port USB charger; for iPods, iPhone, MP4 players, USB devices; 100 to 240VAC input, 5VDC output, 2A current; flexible AC plug; various colors; PSE, FCC, UL, cUL, RoHS; 55x50x23mm, 50g; OEM-specified packaging



iPod accessory

Model	H25B-BB
Minimum order	2,000 units
Packaging type	Blister
Delivery time	20 days
Indicated price	\$2.80

Description: Dual-USB charger; for iPods, iPhone, mobile phones, MP4 players, USB devices; 100 to 240VAC input, 5VDC output, 1 to 1.5A maximum current; 180-degree rotating AC pin; slim design, ABS or PC housing, various colors; PSE, FCC, UL, cUL, RoHS; 55x50x16mm, 36g



iPod accessory

Model	H25B-MT-E2
Minimum order	2,000 units
Packaging type	Blister
Delivery time	20 days
Indicated price	\$2.80

Description: Dual-USB charger; for iPods; 100 to 240VAC input, 5VDC 1A output; ABS or PC housing; CB, CE, RoHS; 55x50x16mm, 36g

PRODUCT GALLERY

iPod accessories



Chaozhou Sycco
(profile page 34)
Model: SK0902B4
Minimum order: 2,000 units
Packaging type: Color box/PE bag
Delivery time: 8 days
Indicated price: \$2.02
Description: iPod/iPhone to 3AV USB cable; RoHS, CE; 1.3m; 55g; ABS material; for iPod nano/classic and iPhone



Chaozhou Sycco
(profile page 34)
Model: SK081022
Minimum order: 2,000 units
Packaging type: Color box/PE bag
Delivery time: 8 days
Indicated price: \$0.42
Description: USB 2.0 data cable; 480Mbps transmission; RoHS, CE; 700mm; 27g; ABS material; for all iPod models



Chaozhou Sycco
(profile page 34)
Model: SK081266
Minimum order: 2,000 units
Packaging type: Color box/PE bag
Delivery time: 8 days
Indicated price: \$0.46
Description: USB 2.0 data cable; 480Mbps transmission; RoHS, CE; 1m; 38g; ABS material; for all iPod models and iPhone 3G



Chinfai
(profile page 36)
Model: ZH-3108
Minimum order: 2,000 units
Packaging type: Blister
Delivery time: 7 days
Indicated price: •
Description: Silicone case; for iPod touch; scratch, bump and drop prevention; flexible, washable; available in various colors; RoHS



Chinfai
(profile page 36)
Model: ZH-3173
Minimum order: 2,000 units
Packaging type: Blister
Delivery time: 7 days
Indicated price: •
Description: Silicone case; for iPhone 3G; flexible, washable; available in various colors; RoHS



Chinfai
(profile page 36)
Model: ZH-3270
Minimum order: 2,000 units
Packaging type: Blister
Delivery time: 7 days
Indicated price: •
Description: Silicone case; for iPod nano (4th generation); flexible, washable; available in various colors; RoHS

• Information not disclosed

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