
WIRELESS MOBILITY ASSEMBLY MARKETS

**A Strategic Report on the Latest Wireless Mobile
Products and their Manufacturing Assembly Value
(COGS), Plus Key Forecasts of Emerging Products**

2012 EDITION

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Chapter 1 - Introduction

The objective of this report is to provide a macroeconomic understanding of the worldwide wireless mobility product market to interested electronics manufacturing services (EMS) firms, original design manufacturers (ODMs), original equipment manufacturing companies (OEMs), component manufacturers, equipment suppliers, distributors, consultants, and investment analysts. To this end, this report examines in detail the size, trends, technology, and market opportunities for all leading mobility products including notebooks, tablets, smartphones, traditional mobile phones and e-readers. It further analyzes business issues and forecasts the market size and growth by various kinds of hardware in terms of unit shipments, average assembly value, total assembly value, operating system, and end-user applications. Finally, the report profiles selected OEM and sub-contracting manufacturing companies, summarizing the products, services, and value propositions offered by leading suppliers.

Information and analysis of this report is current as of November 2012 and includes financial data published up to this date.

The Wireless Mobility Product Assembly Markets report is designed to aid senior management, sales, business development, and marketing executives in their decision-making efforts, so that industry can better estimate production volumes of hardware device by assembly value. Our analysis is unique in that we look at cost of goods sold (COGS) and not end-user value (as sold) which is based on research efforts published in other NVR reports that include *The Worldwide Semiconductor and Manufacturing Assembly Markets - 2012 Edition*, *The Worldwide Electronics Manufacturing Services Market – 2012 Edition*, and *The Worldwide OEM Electronics Assembly Market – 2012 Edition*.

1.1 Scope and Definitions

The scope of this research report covers:

- Five wireless mobile products
- Six or more operating systems depending on various products
- Eight or more end-user segments depending on the product

The market for wireless mobile products is extremely complex and its definitions are imprecise and changing. There are many overlaps in products, markets, models and functionality which naturally create confusion and competition among products. Attempts to put everything into neat buckets and assign a number are challenging given this evolving market, and forecasting is particularly challenging.

Several critical terms are used in this report. They include:

- **Product Shipments:** Product units shipped as reflected in OEM company revenues or 10-K annual reports, not including inventory build-up.
- **Product Assembly:** For this report, product assembly refers to the manufacturing production cost of various electronic components onto a printed circuit board and enclosure, plus any functional test activities performed for final release.
- **Product Assembly Value:** The value (cost of goods sold, or COGS) of all material, labor, and overhead associated with an assembled wireless mobility product. The electronics assembly could be performed by the OEM, EMS or ODM supplier.
- **Average Assembly Value (AAV):** The average value (COGS) of all material, labor, and overhead of the finished wireless mobility electronics product.

1.3 Assumptions

The following assumptions have been made with regard to information provided in this report:

- Respondents are providing truthful information to the best of their ability.
- Metrics (units, revenue or AAV) are accepted as published by companies in annual US dollars.
- Foreign revenue is converted from national currencies into US dollars by the latest Federal Reserve average annual conversion rates.
- All tables presented in this report are subject to small rounding errors. Therefore, column and row numbers, as presented, may not add up exactly to the total presented.

1.3 Report Organization

This report is organized into six chapters.

Chapter 1, “Introduction” - outlines the scope, organization, methodology as defined by common wireless mobility product terminology.

Chapter 2, “Executive Summary” - highlights all key research findings detailed within the main body of the report.

Chapter 3, “Technical Trends” - presents the leading technological developments and specifications for wireless mobile products as of the date of publication of this report.

Chapter 4, “Mobility Assembly Markets by Product and Application, 2011 & 2012”- presents the current business values that are reported for the wireless mobility product market based on company and medial reports.

Chapter 5, “Market Forecasts for Wireless Mobility Products and Applications, 2012-2017” - analyzes the projected product market going forward over the next five years, based on NVR’s understanding of competitive forces among released products and end-user demand.

Chapter 6, “Company Profiles”- provides insight into the key OEM supplier companies relevant to the wireless mobility products market.

1.4 Methodology

The information presented in this report was gathered from a variety of sources. The primary sources were engineering, marketing, business development, and communications managers in wireless mobility product companies, who were contacted via the Internet, by telephone, directly, or at trade shows and conferences. Participant interviewees include industry experts, wireless mobility company employees and independent observers. Secondary sources included company literature (such as websites, annual reports, SEC filings, white papers, and press releases), product reviews and various industry trade publications such as Circuits Assembly, SMT Magazine, EMSNow Daily, Business Week, and the Economist. Additional sources included product materials distributed by wireless mobility product companies at industry conferences, trade shows and symposiums.