

Computer Accessories



May 2009 US\$495

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COMPUTER ACCESSORIES

Supplier capability in China

EXECUTIVE SUMMARY

China is a major production hub for computer accessories, offering a range of USB flash drives, memory cards and readers, optical disc drives or ODDs, HDDs, solid state disks or SSDs, and speakers. For USB flash drives alone, the country contributes 80 percent of global supply. Makers estimate their output this year will hit 79 million units.

Strong demand for large-capacity storage devices will boost China's young portable HDD and SSD sectors. SSDs are the fastest-growing line in the NAND flash market at present. Although the country's supplier pool for both HDDs and SSDs remains small and will not likely expand significantly in the next few months, companies are confident that rising adoption in the computer and consumer electronics industries will spur production and exports.

China suppliers made 100 million memory cards and 25 million readers last year. The country accounts for 15 percent of the world's memory card production. Output consists of the SD family, MS, MMC and CF formats. Multifunction readers dominate, as only a few companies offer single-card versions.

Computer speakers from China represent 80 percent of global supply. Makers expect a slight downturn in export sales this year, but remain optimistic that the country will continue to be a major manufacturing hub for this product.

The following are some of the key trends in China's computer accessories industry:

- Declining NAND flash memory chip costs will spur product development and manufacturing in the USB flash drive and SSD segments.
- There is growing interest in USB 3.0 flash drives, but USB 2.0 is expected to keep its mainstream position for the next few years.

- Makers of portable storage devices are matching rising demand for large capacity by introducing models that support up to 1TB memory. Some are expected to release 2 and 4TB versions in coming months.

- Product development in external enclosures revolves around smaller form factors, better heat management and data protection.

- SATA-based, ultraslim and slot-loading ODDs lead the selection in China. IDE units are expected to exit the line in the near future.

- The SD series will continue to dominate the memory card sector. Emphasis on smaller types will bolster the output of miniSD, microSD and SDHC versions.

- Suppliers of computer speakers focus on portable designs, better audio quality and value-added features.

- Many companies are leaning toward a price increase despite tight competition. Adjustments will, however, be limited to 10 percent as makers try to remain competitive.

This report covers HDDs and SSDs, USB flash drives, optical disc drives, memory cards and readers, and computer speakers. The survey was conducted on manufacturers of these products.

The Industry Overview discusses developments in the different sectors, including makers' strategies to survive current market challenges. It also mentions key trends and R&D priorities in coming months.

The main manufacturing centers for computer accessories in China are the provinces of Guangdong, Jiangsu and Zhejiang.

Makers leverage the mature supply chain, strong R&D capability and competitive prices in these areas. Guangdong is the largest base with the most number of suppliers. Shenzhen, Dongguan and Huizhou are the key sourcing hubs in the province.

In this report

- 26 in-depth company profiles
- 33 additional suppliers
- 75 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 in the next 12 months. All survey questions are single choice. Results were calculated based on the actual number of valid responses to each question.

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INDUSTRY OVERVIEW

China remains a major production hub for computer accessories, supplying a range of USB flash drives, memory cards and readers, optical disc drives or ODDs and speakers. Its nascent portable HDD and solid state disk or SSD sectors are expected to continue expanding as well.

The thriving portable storage industry is driving market momentum, particularly in the USB flash drive, portable HDD and SSD segments. Makers of USB flash drives in China produced 75 million units in 2008, accounting for 80 percent of global supply. Continued capacity expansion and R&D will raise this to 79 million by the end of the year. Although tightening competition and slowing sales could push some small companies out of the line in coming months, suppliers forecast the low entry barrier will attract newcomers, which can bolster output and help keep the line buoyant.

Declines in the cost of NAND flash memory chips will also fuel product development and manufacture. The steady influx of new models and designs will help boost China's selection, thereby securing the

country's lead in the global USB flash drive industry in the next few years.

The strong laptop market and the increasing popularity of Internet-based applications are also catalysts of growth. Suppliers expect rising demand for data portability and accessibility will sustain the portable storage device industry in general, and USB flash drives in particular.

The latter's wide adoption is helping pave the way for large-capacity flash-based storage products. SSDs are the most-rapidly growing line among NAND flash devices and continue to make inroads into the mainstream supply. The sector is estimated to reach \$260 million this year and will keep rising to breach the \$6 billion mark by 2011, according to iSuppli. The market research firm predicts SSDs will account for 40 percent of the NAND flash market by 2012, a huge jump from its 5 percent share in 2008.

Support from major international suppliers will fuel the SSD segment. In January last year, Lenovo launched its ThinkPad X300, claimed to be the industry's first mainstream notebook PC designed not to integrate a hard drive but a 64GB SSD. Dell followed

Supplier summary

Suppliers surveyed	26
Export sales	\$391.6mn
Export ratio	83%
OEM business	63%
Capacity utilized	67%
Annual R&D spending	\$34.6mn
Full-time employees	10,827

Data: All surveyed suppliers

with its all-SSD Latitude D420 ultra-mobile PC and D620 ATG semirugged laptop. South Korea's Samsung offers both HDDs and SSDs. Micron plans to launch a high-end SSD that can deliver 1Gbps throughput by using a PCI Express interface rather than the traditional SATA or SAS.

Portable external HDDs are fast penetrating the enterprise and digital home/consumer markets despite NAND flash alternatives such as USB drives, SSDs and memory cards. Besides their larger storage capacity, these products cost less per gigabyte, which translates into savings for buyers and suppliers alike. The ongoing transition from desktop to notebook PCs is fast-tracking the adoption of external HDDs even as built-in drives continue to command the overall hard disk market.

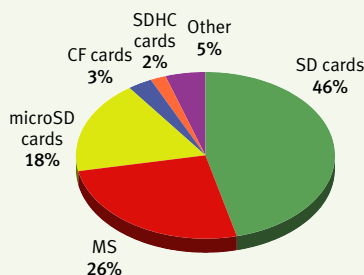
Global Sources online metrics

Memory cards

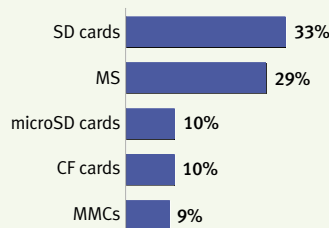
Online metrics are taken from buyer and supplier activity in the featured product group on www.globalsources.com in the month preceding publication of this update.

- **Buyer requests** track total inquiries from our worldwide community of more than 750,000 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.

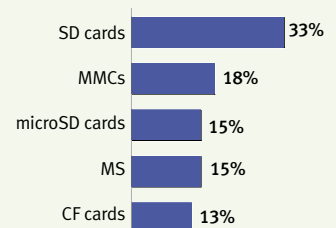
Top buyer requests



Top product profiles



Top new product postings



Percent of all online activity for this product group

Dongguan Earson Audio Technology Co. Ltd

Dongguan Earson specializes in computer speakers, which generated \$10 million in sales in 2008.

The company manufactures up to 100,000 computer speakers a month. Production is conducted in a 15,000sqm factory with a monthly capacity of 160,000 units and a workforce complement of 600. PCB design and subassembly, cosmetic design and final assembly are done in-house.

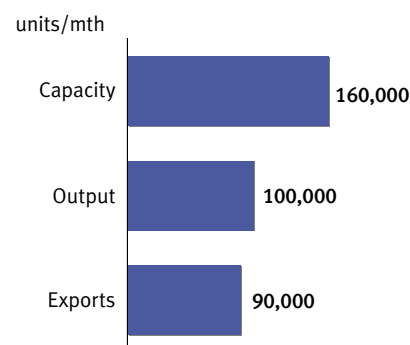
Dongguan Earson ships 90 percent of its output overseas. The main export destinations are the Asia-Pacific

region, EU countries and the Middle East. Exports are split between OEM with an 85 percent share and ODM, 15 percent. One of the major customers of the company is Medion of Germany.

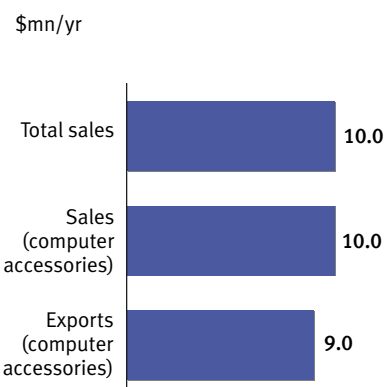
The supplier expects sales to increase by more than 20 percent in the next 12 months. It also projects a more than 15 percent rise in prices. It allocates 3 percent of sales for product development each year. Its 20-engineer R&D team is focused on enhancing housing design. To boost export capability, the company plans to broaden its selection range.

Profile

Production



Sales



Contact details

Business contact

XU Faming

Phone

(86-769) 8902-7609

Fax

(86-769) 8902-7603

E-mail

xfm@earson-audio.com

URL

www.earson-audio.com

www.globalsources.com/earsonaudio.co

Address

2-1 Chuangye Industry Road,
Chuangye Industry Park,
Guanqiaojiao, Wanjiang, Dongguan,
Guangdong, China

Company facts

Year established	2007
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Dongguan (Guangdong)
Number of factories	1
Factory location(s)	Dongguan (Guangdong)
Total factory area	15,000sqm
No. of full-time employees	600
No. of R&D/design staff	20
No. of QC staff	50
Annual sales (all products)	\$10.0mn
Annual R&D spending	\$300,000
ISO certification	Yes

Sales & output: Computer accessories

Annual sales	\$10.0mn
Share of total sales	100%
Annual export sales	\$9.0mn
Total monthly capacity	160,000 units
Average monthly output	100,000 units
Capacity utilized	63%
Average monthly exports	90,000 units
Export ratio	90%
OEM % of exports	85%
ODM % of exports	15%
OBM % of exports	—
Major customer	Medion (Germany)

Capability

Production checklist

Cosmetic design	Yes
PCB making/design/ subassembly	Yes
Mold making	No
Plastic injection	No
SMT	No
Silkscreen/offset printing	No
Final assembly	Yes

Exports by product

HDDs/SSDs	—
Optical drives	—
USB flash drives	—
Memory cards and readers	—
Computer speakers	100%

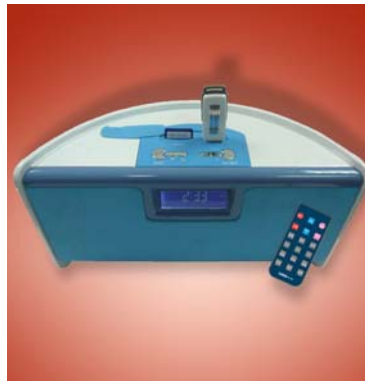
Exports by market

North America	—
European Union	20%
Europe (non-EU)	—
Asia-Pacific	70%
Middle East	10%
Other	—

Outlook

- **Export prices**
Increase
- **Export price increase**
More than 15%
- **Export sales**
Increase more than 20%
- **Target markets**
Argentina, Brazil, Chile, Mexico
- **Capital expenditure**
Increase up to 50%
- **Major challenge**
Stricter overseas standards
- **Export capability**
Widen product range
- **R&D focus**
Enhance housing design

Popular export models



Computer speakers

Model	ER388M
Minimum order	300 sets
Packaging type	Colored box
Delivery time	30 days
Indicated price	\$32

Description: 30Hz to 20kHz frequency response; 2x4W, 12W power output; 4ohm impedance; 62dB S/N ratio; LCD, FM radio, host function, full-function remote control, U-disk and SD card connection; 281x145x106mm subwoofer, 390x189x132mm box; 2.5kg



Computer speakers

Model	ER2198
Minimum order	300 sets
Packaging type	Colored box
Delivery time	30 days
Indicated price	\$68

Description: 2.1-channel multimedia speakers; 60Hz to 18kHz frequency response; 2x8W, 25W power output; 4ohm impedance; external digital audio center with wireless transmitter, master volume, high bass, mute, SD card, USB, FM radio, MP3 player



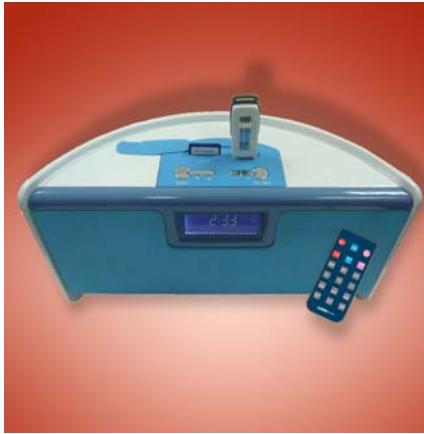
Computer speakers

Model	ER1009
Minimum order	2,000 sets
Packaging type	Colored box
Delivery time	25 days
Indicated price	\$8

Description: 2-channel speakers; 60Hz to 18kHz frequency response; 2x0.8W, 1.5W power output; 6ohm impedance; 70dB S/N ratio; 3.5mm stereo audio input interface; 66.4x65x67mm; 0.32kg

PRODUCT GALLERY

Computer speakers



Dongguan Earson
(profile page 30)
Model: er388m
Minimum order: 300 sets
Packaging type: Colored box
Delivery time: 30 days
Indicated price: \$32
Description: 30Hz to 20kHz frequency response; 2x4W, 12W power output; 4ohm impedance; 62dB S/N ratio; LCD, FM radio, host function, full-function remote control, U-disk and SD card connection; 281x145x106mm subwoofer, 390x189x132mm box; 2.5kg



Dongguan Earson
(profile page 30)
Model: ER2198
Minimum order: 300 sets
Packaging type: Colored box
Delivery time: 30 days
Indicated price: \$68
Description: 2.1-channel multimedia speakers; 60Hz to 18kHz frequency response; 2x8W, 25W power output; 4ohm impedance; external digital audio center with wireless transmitter; master volume, high-bass, mute, SD card, USB, FM radio, MP3 player



Dongguan Earson
(profile page 30)
Model: ER1009
Minimum order: 2,000 sets
Packaging type: Colored box
Delivery time: 25 days
Indicated price: \$8
Description: 2-channel speakers; 60Hz to 18kHz frequency response; 2x0.8W, 1.5W power output; 6ohm impedance; 70dB S/N ratio; 3.5mm stereo audio input interface; 66.4x65x67mm



Gembird
(profile page 32)
Model: SPK-402
Minimum order: 1,000 sets
Packaging type: Gift box
Delivery time: 30 days
Indicated price: •
Description: 2x8W speakers; 40Hz to 18kHz frequency response, 20Hz to 20kHz amplifier; 360W PMPO, ±10dB tweeters, ±10dB woofer; 75dB S/N ratio, 45dB separation; magnetically shielded; 2.25in driver units, 3.5mm stereo earphone jack, plastic cabinet



Gembird
(profile page 32)
Model: WCS-801
Minimum order: 500 sets
Packaging type: Gift box
Delivery time: 30 days
Indicated price: •
Description: 2.1-channel speakers; 30Hz to 20kHz frequency response, 20Hz to 20kHz amplifier; 1000W PMPO, 20W 8ohm subwoofer, 2x15W satellite speakers; 75dB S/N ratio, 45dB separation, 10dB treble, 10dB bass; 5.25in shielded woofer



Gembird
(profile page 32)
Model: WCS-8001
Minimum order: 500 sets
Packaging type: Gift box
Delivery time: 30 days
Indicated price: •
Description: 7.1-channel speaker system; 20Hz to 20kHz subwoofer, 30Hz to 20kHz front, 50Hz to 20kHz center, 40Hz to 20kHz surround; 30W subwoofer, 105W satellite speakers; 8ohm impedance; magnetically shielded; 5.25in subwoofer

• Information not disclosed

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