

Computer Accessories



March 2010 US\$495



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COMPUTER ACCESSORIES

Supplier capability in China

EXECUTIVE SUMMARY

China remains the biggest supplier of computer accessories worldwide, producing keyboards, mice, portable storage devices, speakers, headsets, microphones, cameras and peripherals. Output is expected to continue rising this year as demand picks up pace after dropping slightly in 2009 following the economic recession.

To sharpen their competitive edge amid export recovery, makers are turning out more models that meet buyers' design and performance requirements. The laptop segment, in particular, is a major growth driver, especially for miniature PC speakers and locks.

Mice and keyboards utilize mature and emerging technologies. Among wireless standards, 27MHz and 2.4GHz RF and Bluetooth are adopted. The first two are mainstream, while the last is considered for the high end. Suppliers plan to release more noncorded units under efforts to broaden range and boost competitiveness. Wired versions, however, will continue to dominate output due to lower manufacturing costs and price. Adoption of the USB 3.0 specification, meanwhile, is not expected to rise for a few more years pending wider market acceptance.

Despite the generally positive outlook, some segments are still feeling the negative effects of the global downturn, and experiencing stiff competition and declining sales. To stay viable, these makers are focusing on models with higher performance-to-price ratio or shifting to more lucrative products.

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

- Prices rose slightly in past months as suppliers offset lower order volume and improved profit margins.
- Fierce competition remains the biggest challenge confronting

manufacturers, especially as some segments increasingly become saturated.

- With the anticipated surge in overseas demand, export sales are expected to climb 10 to 20 percent.
- The EU and North America are still the most important markets. Makers, however, will also be exploring alternative destinations such as South America.

- Many companies will improve operating efficiency to boost export capability in months ahead.

- Integrating value-added features tops R&D plans. Cosmetic design enhancements will also be a major focus as suppliers introduce more products with ergonomic, sleek and innovative form factors.

This report covers the major types of computer accessories produced in China, which include input devices, portable storage, speakers, USB peripherals, headsets and microphones. The products are discussed in separate sections that detail common features and functions found in mainstream units. Prices, R&D trends and component sourcing are also included.

The Industry Overview section positions China in the worldwide market and discusses growth opportunities in coming months. It identifies the factors shaping the segment, including challenges faced by makers and steps taken to overcome these hurdles and boost competitiveness further.

The country's production base has an aggregate 2,200 companies. Guangdong province is the center of all manufacturing and sourcing activities. It has a complete supply chain covering solutions, components and services. A significant number of enterprises are also located in the provinces of Jiangsu and Zhejiang, while a small percentage can be found in Hubei and Hunan provinces, and Beijing.

In this report

- 43 in-depth company profiles
- 67 additional suppliers
- 198 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, 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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INDUSTRY OVERVIEW

China continues to strengthen its computer accessories industry, sustaining established lines and expanding other categories, to match the dynamic trends in the PC sector. It remains the world's largest supplier of computer keyboards, mice, portable storage devices, speakers, headsets, microphones, cameras, and USB flash drives and peripherals.

Bouncing back from the economic downturn, the global computer sector is picking up pace, even spawning new devices and broadening opportunities for auxiliary products. Local accessory suppliers in fact began seeing improvements in orders by 2H09, and anticipate a sustained rise this year.

Many makers of computer keyboards, for instance, have resumed production at 80 to 90 percent that of precrisis levels by 2H09. The line suffered a temporary setback during the first half, with overseas shipments at 76.6 million units or a 31 percent YoY reduction. Ninety percent of the world's computer keyboard output comes from China.

The PC speaker export industry is looking to benefit from increasing global shipments, albeit at a rate lower than initially forecast due to the dampening effect of the crisis in 2009. The total for this year is expected to reach 127.3 million units, according to HZResearch, up 9 percent from 111.4 million in 2009. This is an improvement from 5 percent YoY growth posted in 2008-09.

Taking advantage of this opportunity, companies are strengthening their foothold in segments where others have quit. They are also offering models that meet buyers' form factor and performance requirements. Since laptops are in vogue, makers see greater potential for notebook PC speakers, particularly miniature types. China accounts for about 80 percent of global output in this category.

The production outlook for PC cameras has been revised, and better prospects may reduce the number of exiting suppliers. Makers are leveraging the country's lower manufacturing costs as opposed to other regions. More are building in-house labels, a sign that many are optimistic of growth. Own-brand manufacturing is therefore gaining momentum even as OEM and ODM projects continue to be a strong focus for companies. Most expect China to maintain its position as the largest supplier of PC cameras worldwide with an 80 percent share of global shipments.

The USB flash drive sector is likewise changing its export sales projections as markets recover. The drop in the cost of NAND flash memory chips is also fueling production. With the expanding supply range, the country will keep its position as the world's largest supplier of the product, accounting for 70 to 80 percent of total yield.

The rising popularity of USB DVB devices, driven by the increasing adoption in personal A/V and networked entertainment segments, is keeping China's USB peripherals industry buoyant. The former is likewise forecast to grab a bigger slice

Supplier summary

Suppliers surveyed	43
Export sales	\$763.3mn
Export ratio	80%
OEM business	66%
Capacity utilized	74%
Annual R&D spending	\$88.5mn
Full-time employees	20,406

Data: All surveyed suppliers

of China's total TV tuner output.

Although not as dynamic, the gifts sector is considered a major category. In fact, more than 40 percent of the supplier base pursues the line. The top demand drivers are speakers, lights and fans.

China is the largest provider of USB peripherals worldwide, representing about 70 percent of total shipments. In addition to USB DVB devices and gift products, massagers, radios, audio and SATA/IDE adapters, and port replicators are available.

In the card reader sector, suppliers are optimistic orders will increase together with the recovering economy. Demand has been largely unaffected by the global recession. The incorporation of card readers in notebook and desktop PCs and other consumer electronics, however, is seen to deter growth in the

Major customers

Company	
Eastern Times	Targa (Germany); Sanwa (Japan); HP (Singapore); iHome (US); Verbatim (US, UK)
Shenzhen DT	Siemens (Germany); McDonald's (US)
Shenzhen Good & Easy	Ohm (Japan); Happy Buy (South Korea)
Shenzhen Kinlan	Carrefour (France); CircuitCity, RadioShack, Lexmark (US)
Shenzhen Qant	Hama (Germany); Aqipa (Austria)
Shenzhen Vigor	IBM (US); Intel (the Netherlands)
Shenzhen Well-Share	Orbitel (Colombia)
Star Technology	Casino (France); Techair (UK); ESI (US)
Starmate	Motorola (Japan); Wal-Mart, Disney (US)
Tons	SVEN (Russia); Leadership (Brazil)
Zhuhai Hanwei	Multilaser (Brazil); Hama (Germany)

Data: All surveyed suppliers

Ask Tech Co. Ltd

Ask Tech generates more than 80 percent of total annual sales from computer accessories. Revenue from the line in 2009 reached \$25 million, all coming from exports. PC-to-TV converters comprised the bulk of shipments.

Up to 12,000 computer accessories can be manufactured a month. An average of 10,000 units are actually produced and delivered overseas. North America and the EU each account for 30 percent of exports, while the Middle East, the Asia-Pacific region and non-EU countries absorb the rest. The

company is planning to boost its market in the EU in months ahead, and expects this to boost overseas sales by more than 20 percent.

Operations are based in Guangdong province. The in-house QC team has nine members, while 12 are in charge of product development.

The R&D department receives an annual allocation of \$700,000, equivalent to about 2 percent of total revenue. Enhancements in the computer accessories line will revolve around upgrading the connecting interface.

Company facts

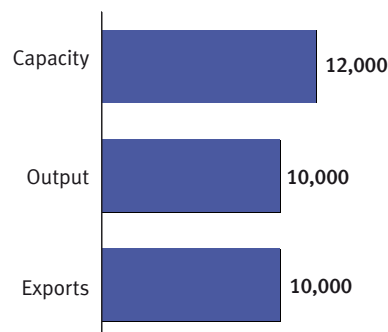
Year established	2004
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Shenzhen (Guangdong)
Number of factories	1
Factory location(s)	Shenzhen (Guangdong)
Total factory area	2,800sqm
No. of full-time employees	78
No. of R&D/design staff	12
No. of QC staff	9
Annual sales (all products)	\$30.0mn
Annual R&D spending	\$700,000
ISO certification	Pending

Sales & output: Computer accessories

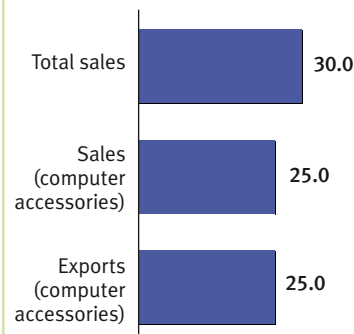
Annual sales	\$25.0mn
Share of total sales	83%
Annual export sales	\$25.0mn
Total monthly capacity	12,000 units
Average monthly output	10,000 units
Capacity utilized	83%
Average monthly exports	10,000 units
Export ratio	100%
OEM % of exports	20%
ODM % of exports	70%
OEM % of exports	10%
Other products made	A/V switches, distributors, control boxes; CCTV switchers, multiplexers; HDD media players; HDMI DVD players, cable assemblies, splitters, switches; video system converters

Profile

Production units/mth



Sales \$mn/yr



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Capability

In-house processes

Cosmetic design	Yes
PCB assembly	Yes
Mold making	Yes
Plastic injection	No
SMT	Yes
Silk-screen/offset printing	No
Durability tests	Yes

Exports by product

Computer input devices	—
Computer speakers	—
Other accessories	100%
Optical drives	—
PC cameras	—
Portable storage	—
USB peripherals	—

Exports by market

North America	30%
European Union	30%
Europe (non-EU)	10%
Asia-Pacific	10%
Middle East	15%
Other	5%

Survey

- **Export prices**
Decreased
- **Export price decrease**
Less than 5%
- **Export sales**
Increase more than 20%
- **Target market**
European Union
- **Capital expenditure**
Increase more than 50%
- **Major challenge**
Price competition
- **Export capability**
Shorten design/development time
- **R&D focus**
Upgrade connecting interface

Popular export models



Other accessory

Model	HDCDVI0101
MOQ	50 units
Packaging	Gift box
Delivery	7 days
Price	\$28

Description: PC-to-TV converter; from DVI video+SPDIF to HDMI; 1080p, 60Hz; up to 20m HDMI 26AWG cable; 89x70x33mm; 435g; CE, FCC, RoHS



Other accessory

Model	HDCVGA0101
MOQ	50 units
Packaging	Gift box
Delivery	7 days
Price	\$28

Description: PC-to-TV converter; from VGA+R/L to HDMI; 1280x1024 pixels; up to 20m HDMI 26AWG cable; 89x70x33mm; 435g; CE, FCC, RoHS



Other accessory

Model	HDCYUV0101
MOQ	50 units
Packaging	Gift box
Delivery	7 days
Price	\$28

Description: PC-to-TV converter; from YPbPr+SPDIF to HDMI; 1080p, 60Hz; 89x70x33mm; 435g; CE, FCC, RoHS

PRODUCT GALLERY

Computer input devices



Bol-Link
(profile page 46)
Model: CYM-9066
MOQ: 1,000 units
Packaging: Blister card
Delivery: 15 days
Price: \$6
Description: Laser gaming mouse; 800, 1,200, 1,600, 2,400cpi; seven buttons for gaming with light on scroll; page up/down keys; can work on any surface including glass



Bol-Link
(profile page 46)
Model: CYM-8005
MOQ: 1,000 units
Packaging: Blister card
Delivery: 15 days
Price: \$2.50
Description: 5D optical mouse; page up/down keys; Windows 7, Vista, XP, ME, 2000, 98 OS; for right-hand users



Bol-Link
(profile page 46)
Model: CYM-8004
MOQ: 1,000 units
Packaging: Blister card
Delivery: 15 days
Price: \$2.30
Description: 4D wired optical mouse; 800, 1,200, 1,600, 2,400cpi; one hot key; Windows Vista, XP, ME, 2000, 98 OS; retractable cable; various colors available



Bol-Link
(profile page 46)
Model: CYM-6016
MOQ: 1,000 units
Packaging: Blister card
Delivery: 15 days
Price: \$2.40
Description: 3D optical mouse; 800cpi; USB, USB+PS/2 combination; Windows Vista, XP, ME, 2000, 98 OS; retractable cable; various colors available



Bol-Link
(profile page 46)
Model: CYM-6011
MOQ: 1,000 units
Packaging: Blister card
Delivery: 15 days
Price: \$10.50
Description: 3D optical mouse; 800cpi; USB; Windows Vista, ME, XP, 2000, 98 OS; bamboo casing; CE, FCC, RoHS



Bol-Link
(profile page 46)
Model: CYM-9091G
MOQ: 1,000 units
Packaging: Blister card
Delivery: 15 days
Price: \$8.50
Description: 2.4GHz wireless mouse; 1,600cpi; 10m operating range; Windows Vista, ME, XP, 2000, 98 OS; cpi changing button for gaming; fold to power off; hidden dongle for easy traveling; CE, FCC, RoHS

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