

China smartphone AP shipments

DIGITIMES Research
Data service forecast, 1Q14

Research Analyst: Eric Lin

January 2014

Introduction

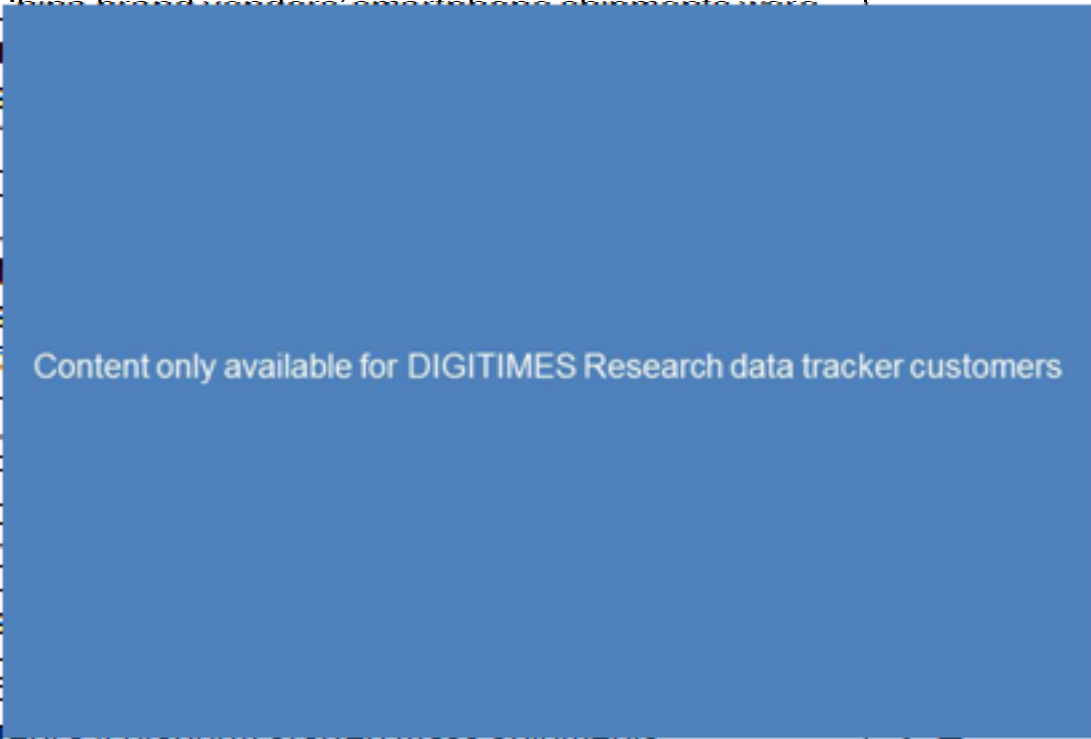
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Key factors affecting China smartphone AP shipments in 4Q13

Factor	Item	Analysis	Influence on shipments
Competition	Brand smartphones	China brand vendors' smartphones shipments were	
	White-box smartphones	D	
Chipmakers	Spreadtrum	It s f r	
	MediaTek	F p	
	Qualcomm	C s G	
	Nvidia	Tegra 4 platform started mass shipments	1 ★



Note: The more stars, the higher the influence. ↓ indicates negative influence, ↑ indicates a positive influence.

Key factors affecting China smartphone AP shipments in 1Q14

Factor	Item	Analysis	Influence on shipments
Seasonality	End players	P	 <p>Content only available for DIGITIMES Research data tracker customers</p>
		b	
Chipmakers	Spreadtrum	E	
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Chipmakers	NVIDIA	Xiaomi's smartphones	

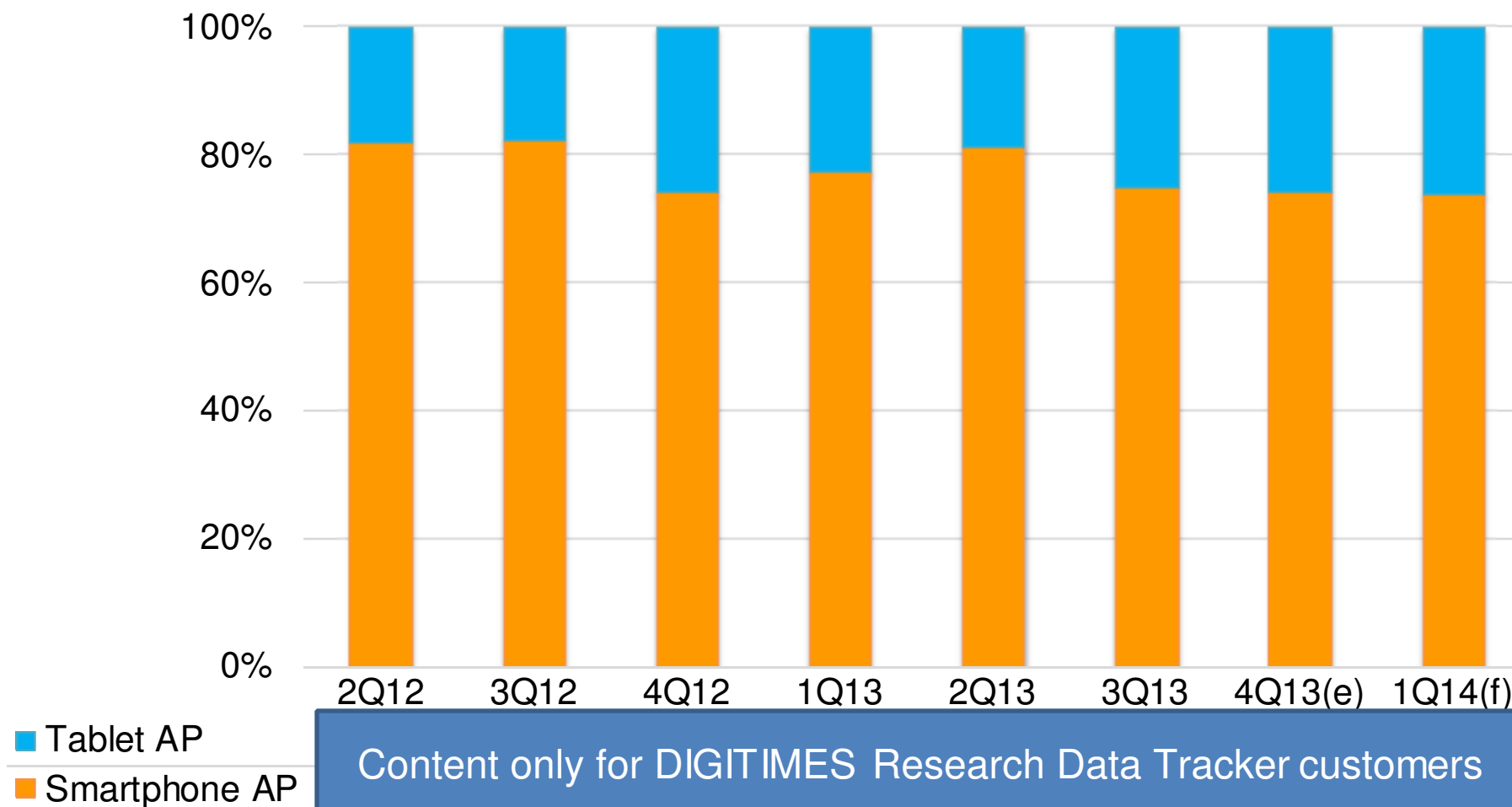
Note: The more stars, the higher the influence. ↓ indicates negative influence, ↑ indicates a positive influence.

Key factors affecting China smartphone AP shipments in 1Q14

- In the first quarter, the top five smartphone brands were expected to perform well.
- Demand in emerging markets is expected to drive the supply chain.
- Since the first quarter, smartphone shipments are expected to turn over.

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China AP shipment share by application

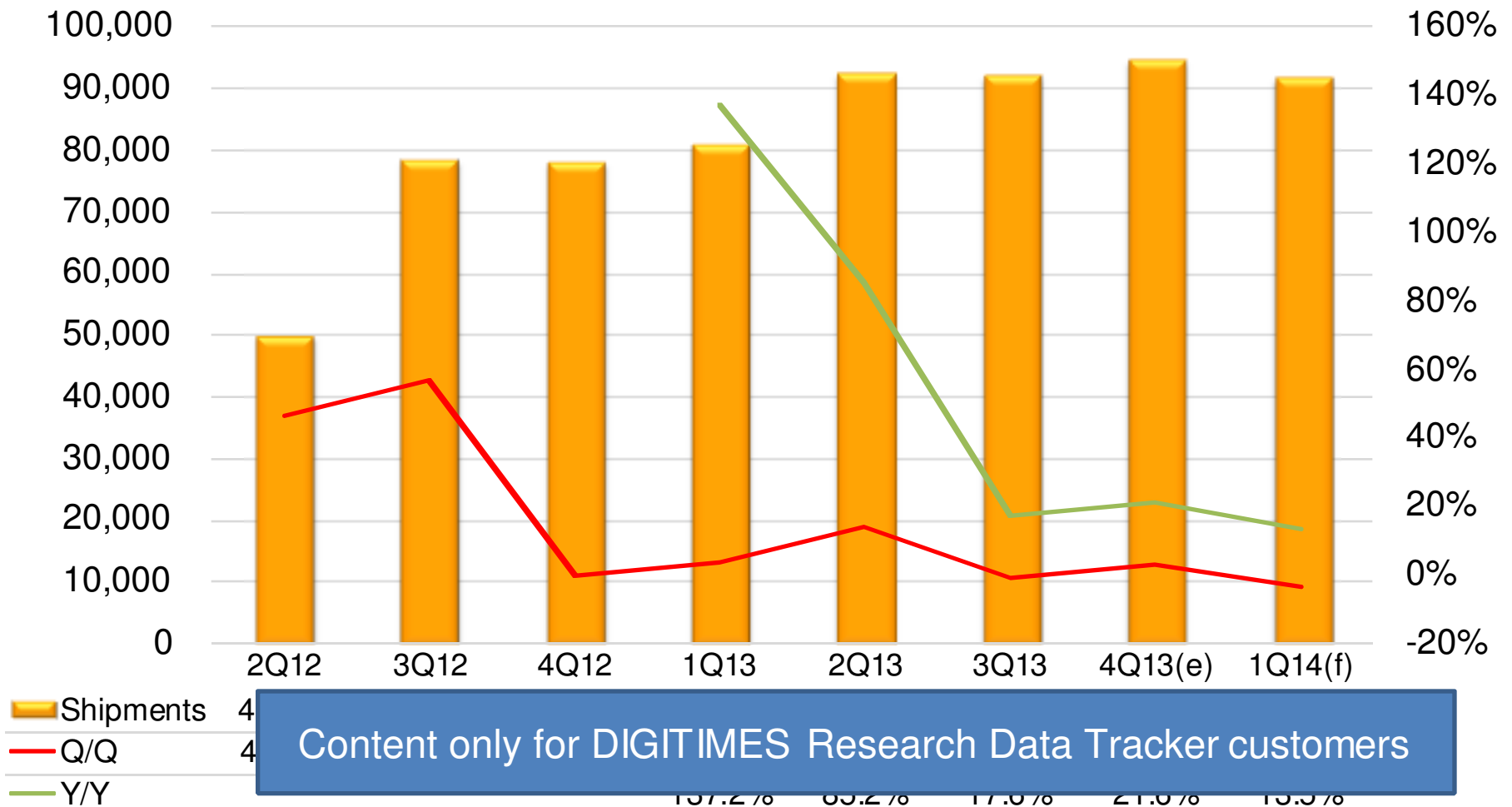


China AP shipment share by application

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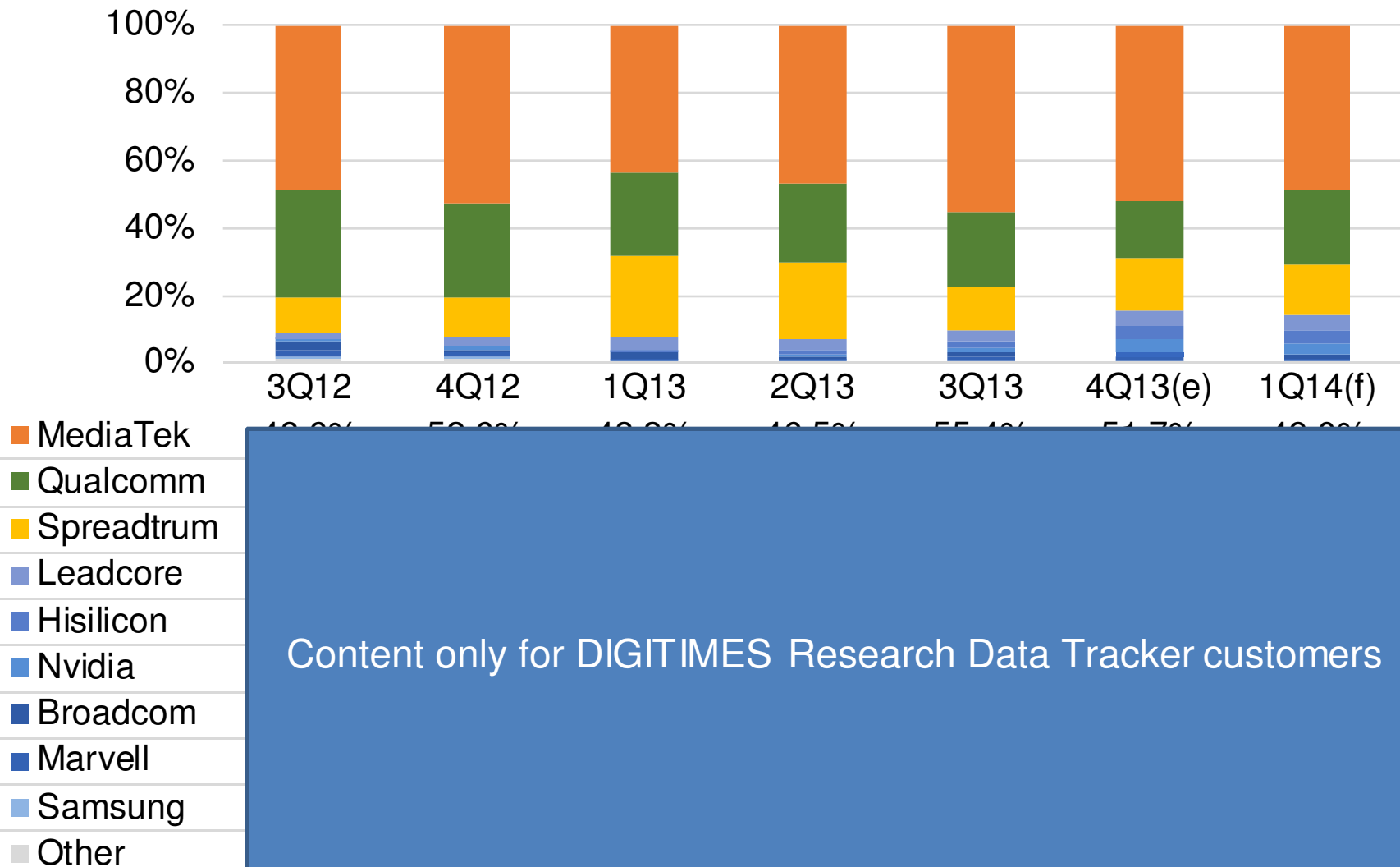
China smartphone AP shipments, 2Q12-1Q14 (k units)



China smartphone AP shipments, 2Q12-1Q14

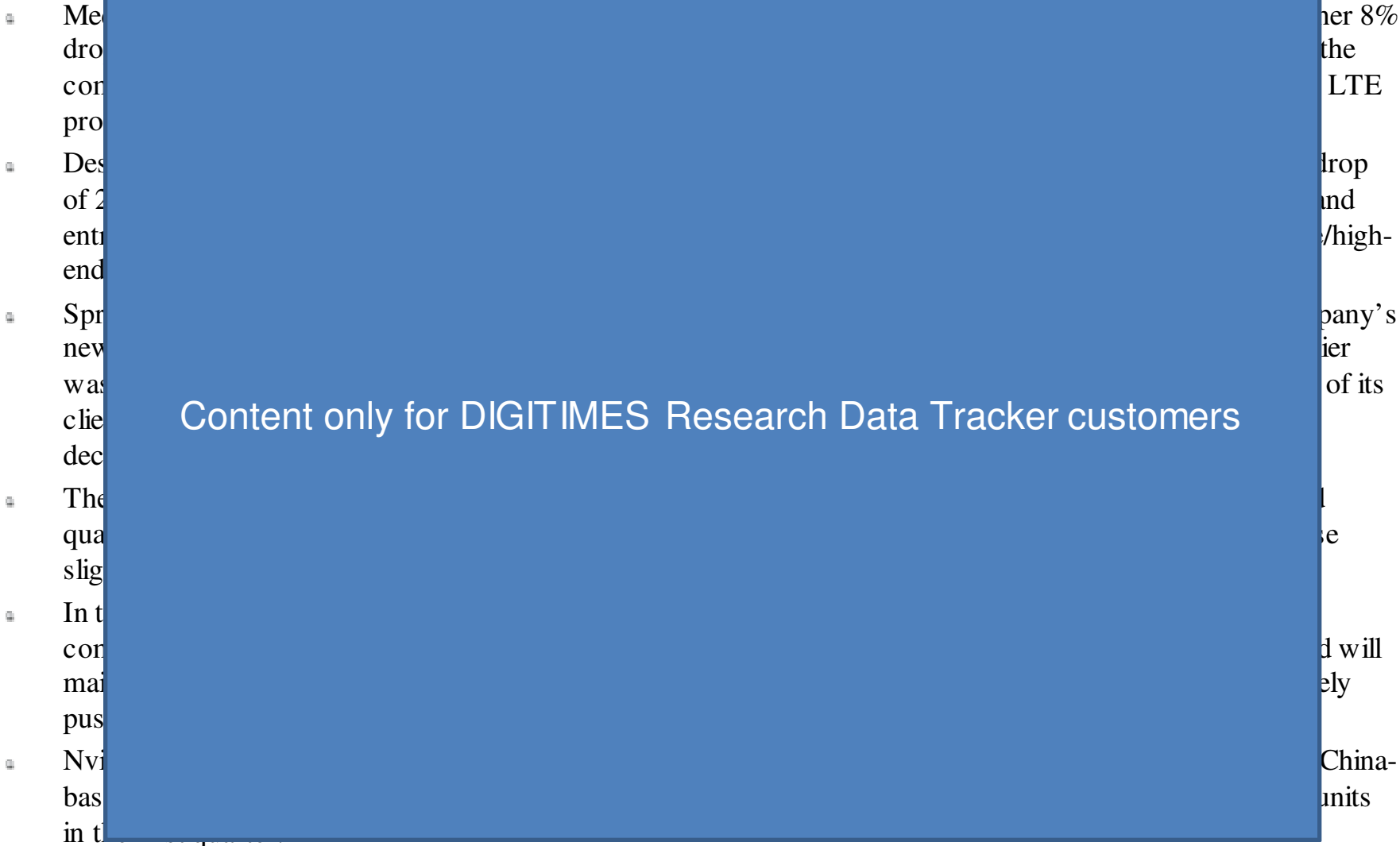


China smartphone AP shipment share by supplier, 3Q12-1Q14

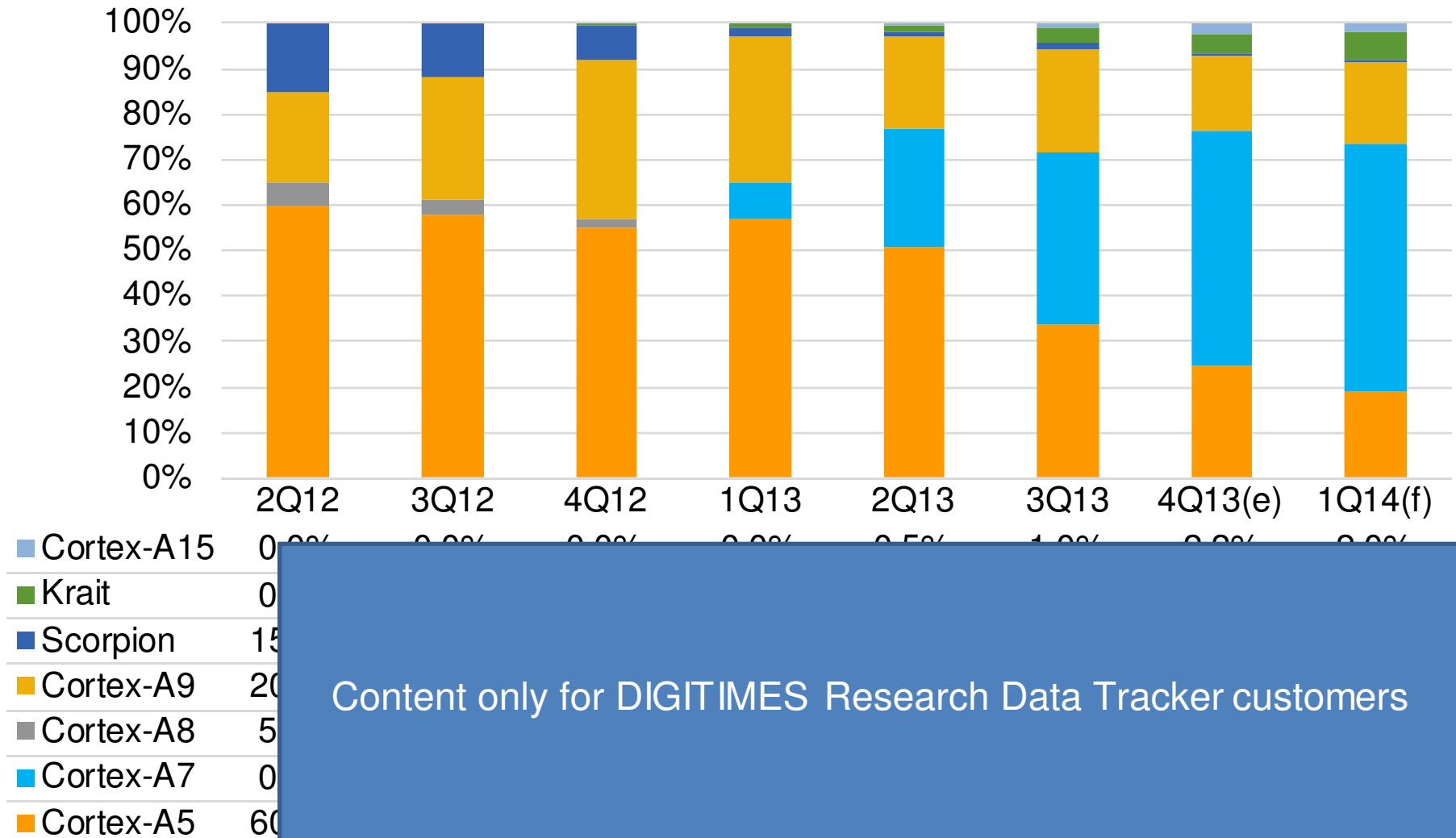


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China smartphone AP shipment share by supplier, 3Q12-1Q14



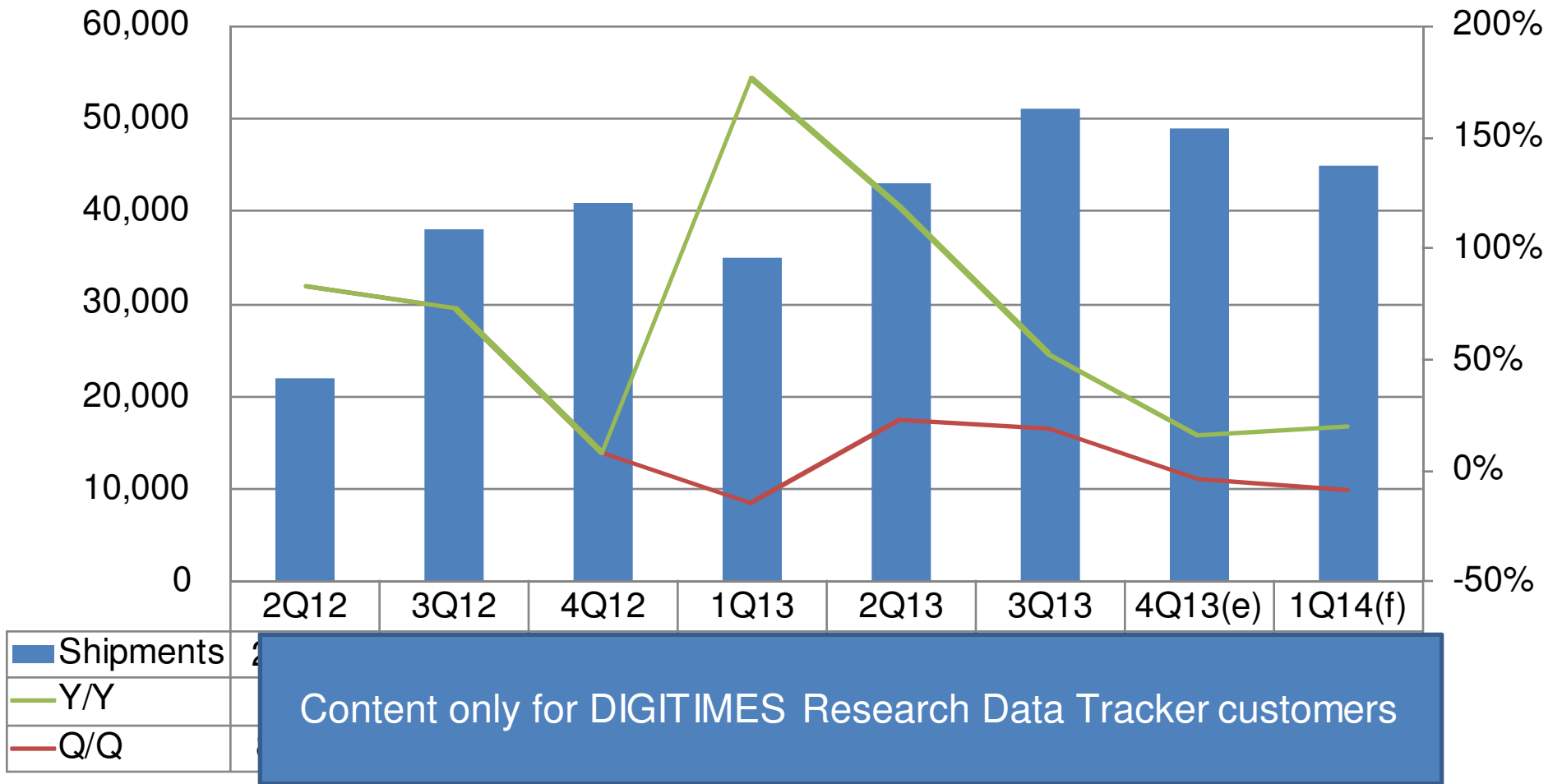
China smartphone AP shipment share by architecture, 2Q12-1Q14



China smartphone AP shipment share by architecture, 2Q12-1Q14



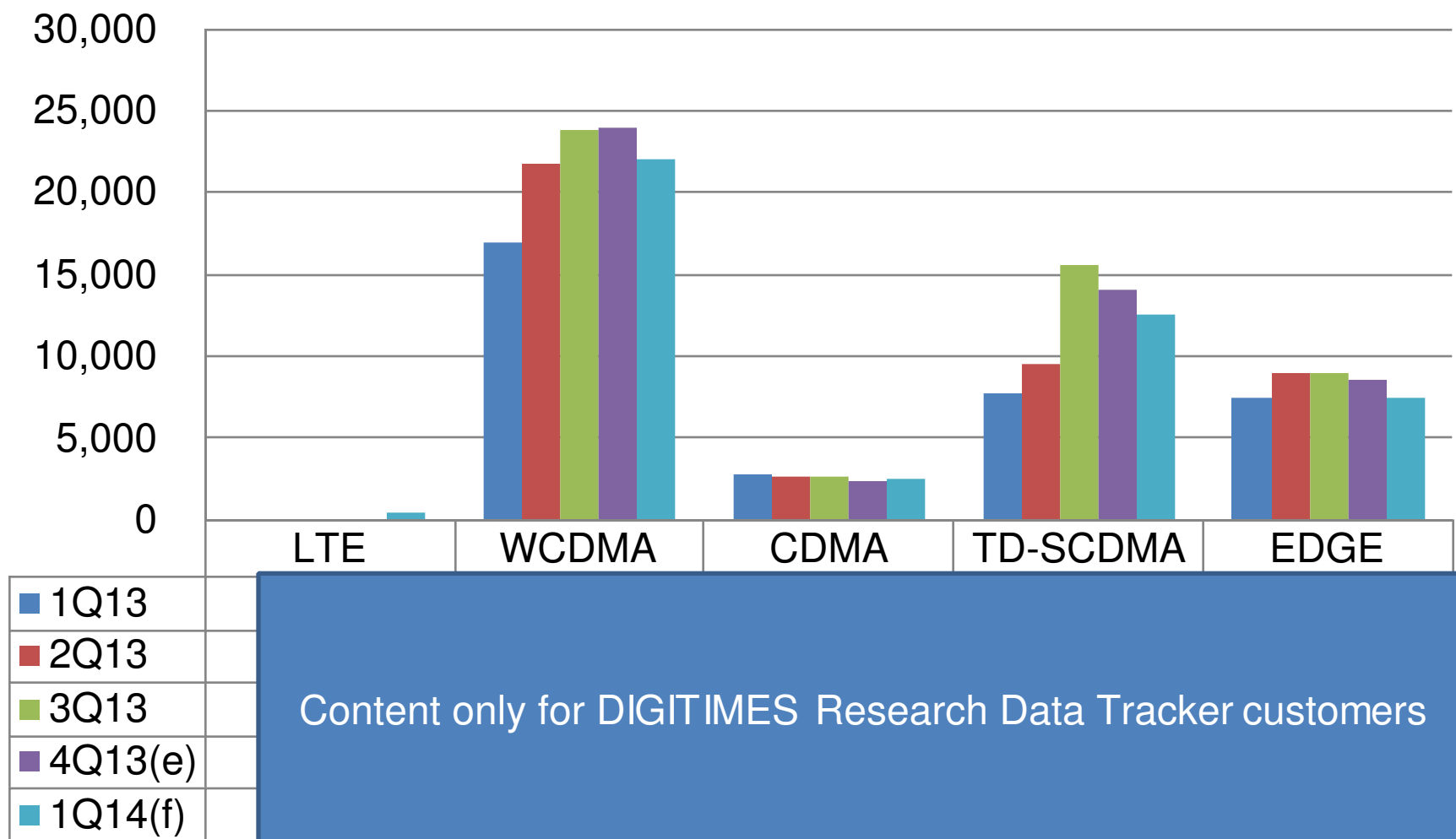
MediaTek smartphone AP shipments, 2Q12-1Q14 (k units)



MediaTek smartphone AP shipments, 2Q12-1Q14



MediaTek shipments by baseband type, 1Q13-1Q14 (k units)

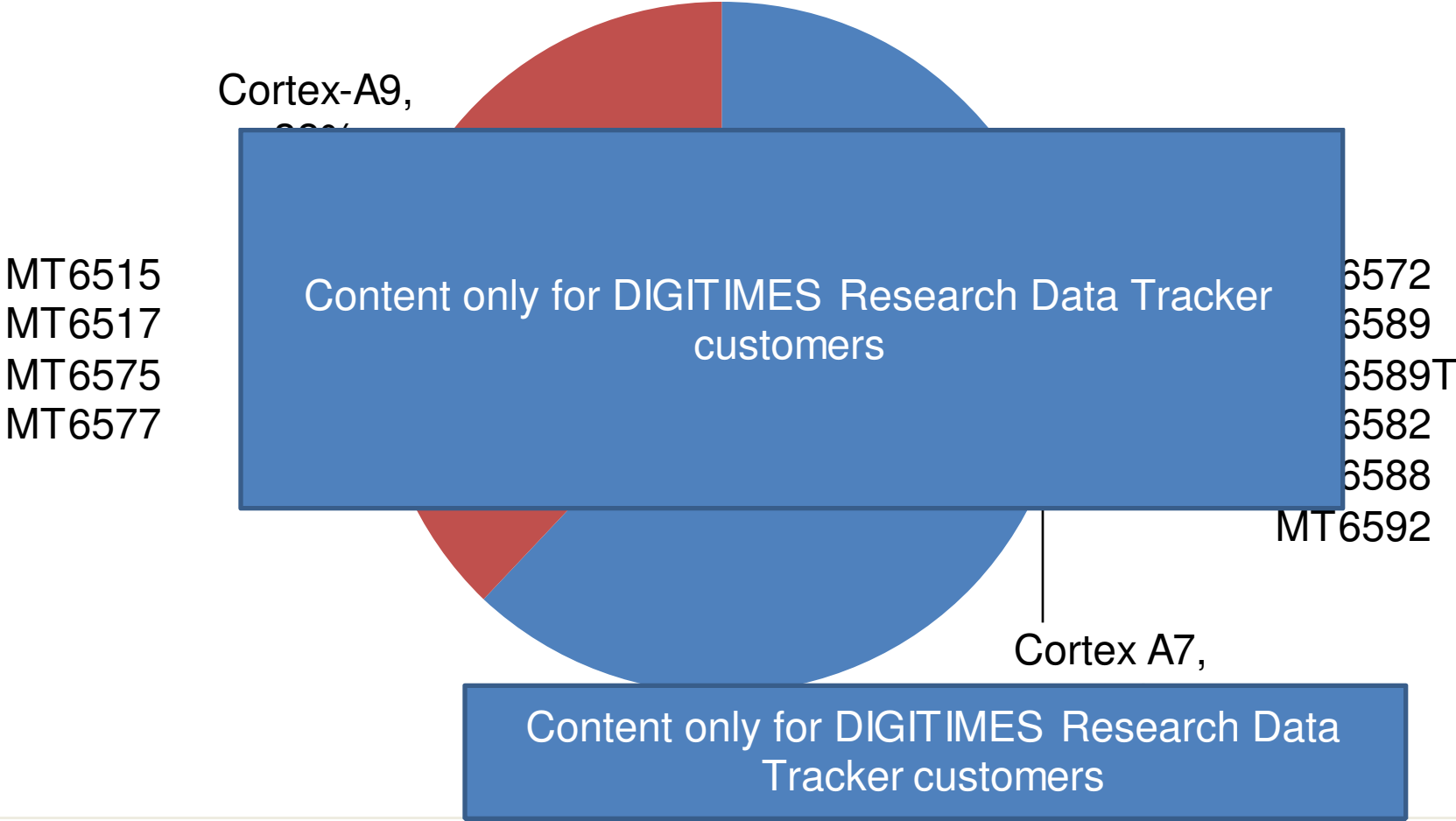


MediaTek shipments by baseband type, 1Q13-1Q14

- MediaTek's shipments of 4G LTE baseband chips continued to grow in 1Q14, with a 10% increase over 4Q13. This growth was driven by the strong performance of the MT6620, which accounted for 8% of total shipments. MediaTek's 4G LTE baseband chips achieved a good performance in the LTE segment.
- Fast-growing 4G LTE baseband chips also drove MediaTek's 4G LTE baseband chip shipments to a record high of 1.2 billion units in 1Q14, up from 1.1 billion units in 4Q13.
- With the strong performance of the MT6620, MediaTek's 4G LTE baseband chips achieved a good performance in the LTE segment.

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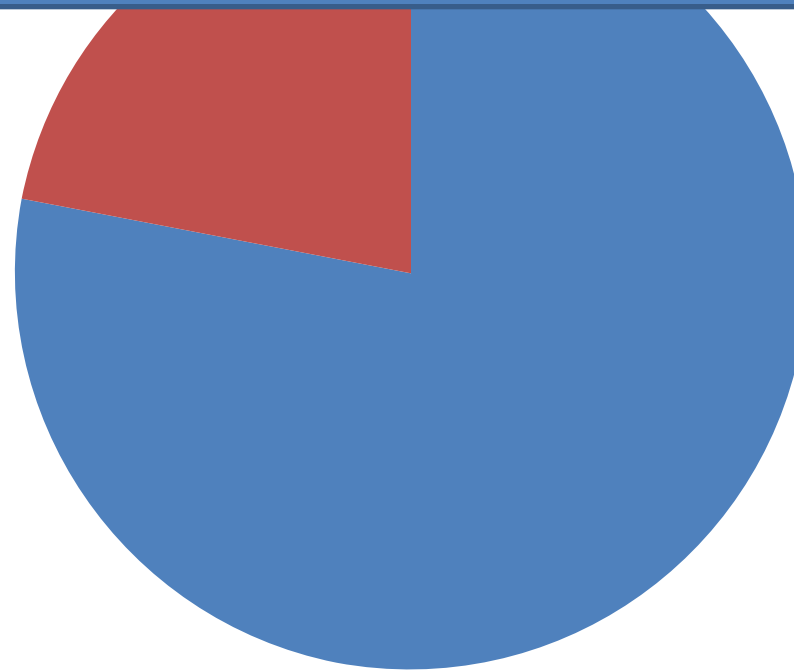
MediaTek smartphone shipment share by architecture, 4Q13



MediaTek smartphone shipment share by architecture, 1Q14

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MT6515
MT6517
MT6575
MT6577



MT6572
MT6589
MT6589T
MT6582
MT6588
MT6592

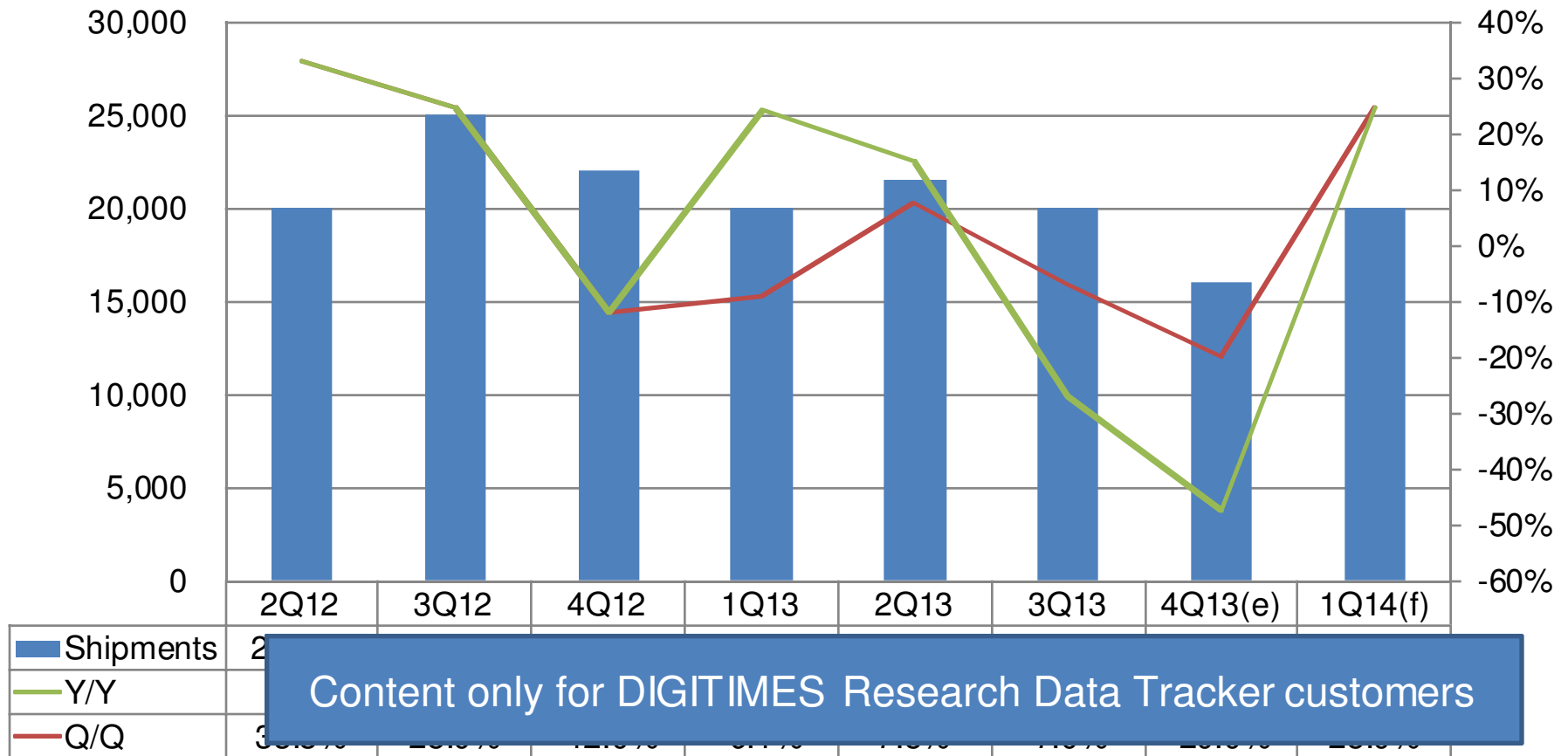
■ Cortex-A7 ■ Cortex-A9

MediaTek smartphone shipment share by architecture, 1Q14

- Although MediaTek designed the MT6515 and MT6517 processors, the market share of these processors is still very low. This is because the market is dominated by ARM-based processors. MediaTek is planning to release new smartphones using the processor.
- The market share of ARM-based processors is still very high. This is because ARM-based processors are more powerful and have better performance. MediaTek is planning to release new smartphones using the processor.

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Qualcomm smartphone AP shipments to China, 2Q12-1Q14 (k units)

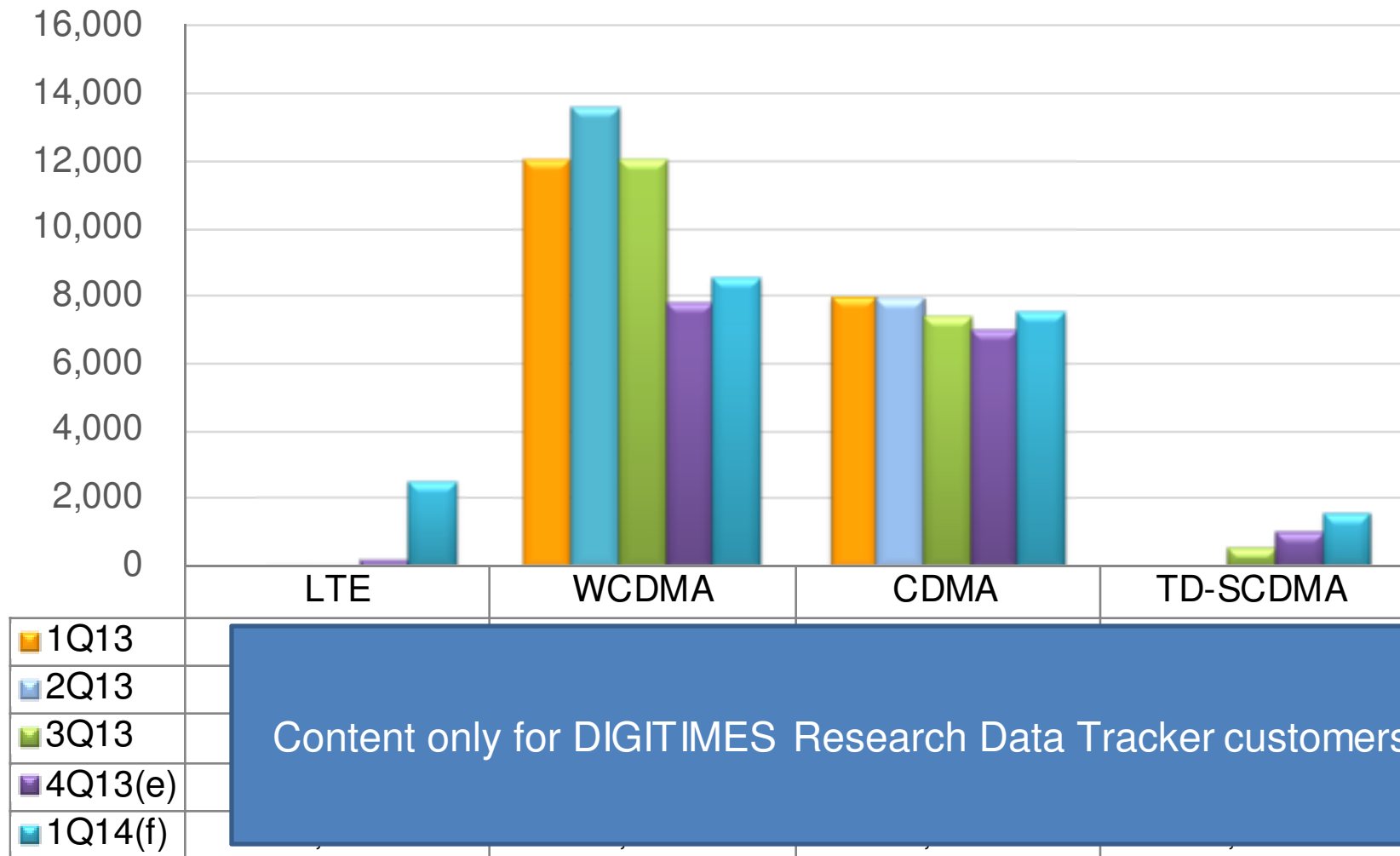


Qualcomm smartphone AP shipments to China, 2Q12-1Q14

- Qualcomm smartphone AP shipments to China in 2Q12 were 1.5 million units, a 10% increase from 1.4 million units in 1Q12. This increase was driven by the launch of the HTC One X, which is the first smartphone to feature the Qualcomm Snapdragon S4 Pro processor.
- Qualcomm smartphone AP shipments to China in 3Q12 were 1.6 million units, a 7% increase from 1.5 million units in 2Q12. This increase was driven by the launch of the HTC One X2, which is the first smartphone to feature the Qualcomm Snapdragon S4 Plus processor.
- Qualcomm smartphone AP shipments to China in 4Q12 were 1.7 million units, a 6% increase from 1.6 million units in 3Q12. This increase was driven by the launch of the HTC One X3, which is the first smartphone to feature the Qualcomm Snapdragon S4 Plus processor.
- Qualcomm smartphone AP shipments to China in 1Q13 were 1.8 million units, a 6% increase from 1.7 million units in 4Q12. This increase was driven by the launch of the HTC One X4, which is the first smartphone to feature the Qualcomm Snapdragon S4 Plus processor.
- Qualcomm smartphone AP shipments to China in 2Q13 were 1.9 million units, a 6% increase from 1.8 million units in 1Q13. This increase was driven by the launch of the HTC One X5, which is the first smartphone to feature the Qualcomm Snapdragon S4 Plus processor.
- Qualcomm smartphone AP shipments to China in 3Q13 were 2.0 million units, a 5% increase from 1.9 million units in 2Q13. This increase was driven by the launch of the HTC One X6, which is the first smartphone to feature the Qualcomm Snapdragon S4 Plus processor.
- Qualcomm smartphone AP shipments to China in 4Q13 were 2.1 million units, a 5% increase from 2.0 million units in 3Q13. This increase was driven by the launch of the HTC One X7, which is the first smartphone to feature the Qualcomm Snapdragon S4 Plus processor.
- Qualcomm smartphone AP shipments to China in 1Q14 were 2.2 million units, a 5% increase from 2.1 million units in 4Q13. This increase was driven by the launch of the HTC One X8, which is the first smartphone to feature the Qualcomm Snapdragon S4 Plus processor.

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Qualcomm shipments by baseband type, 1Q13-1Q14 (k units)

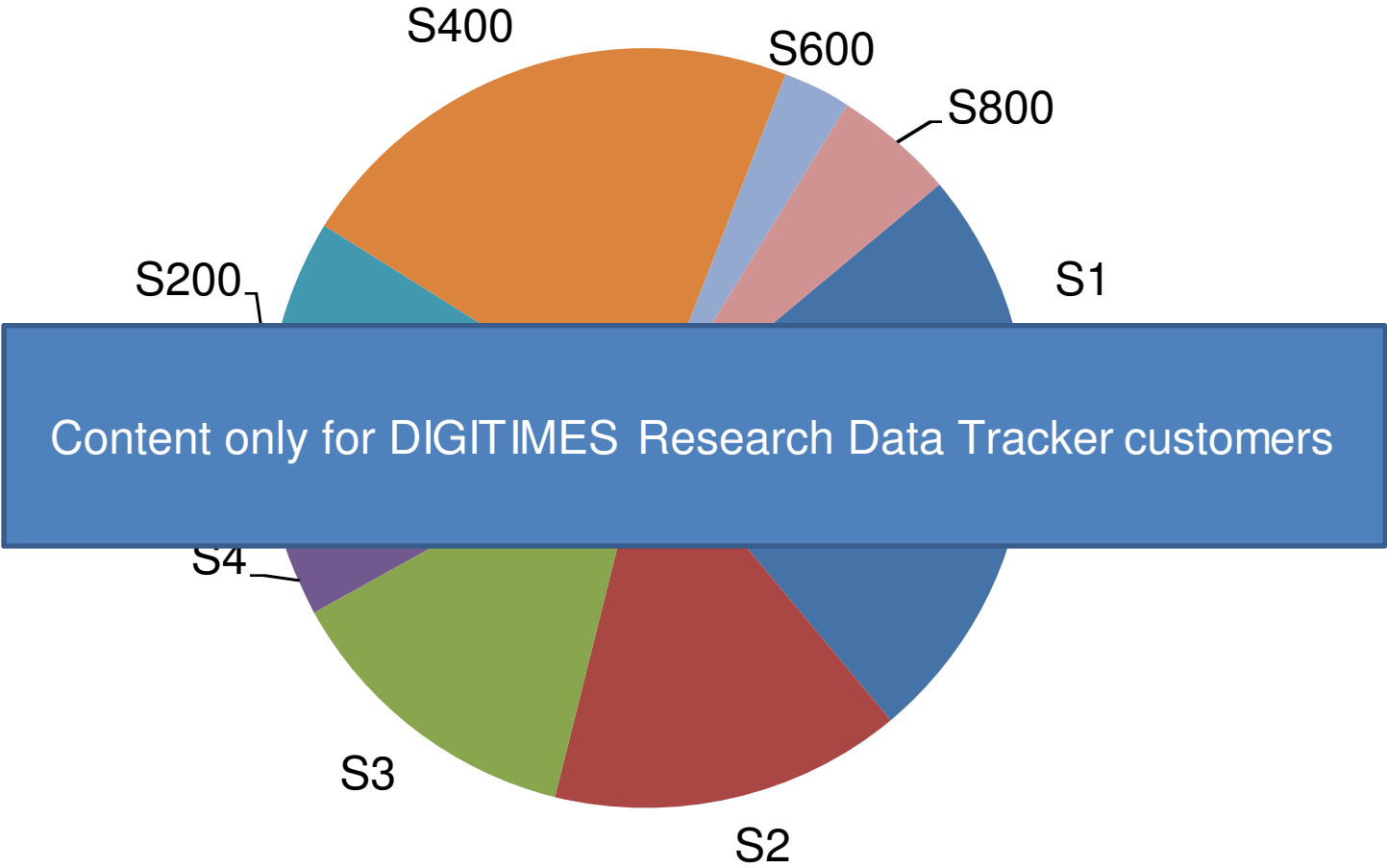


Qualcomm shipments by baseband type, 1Q13-1Q14

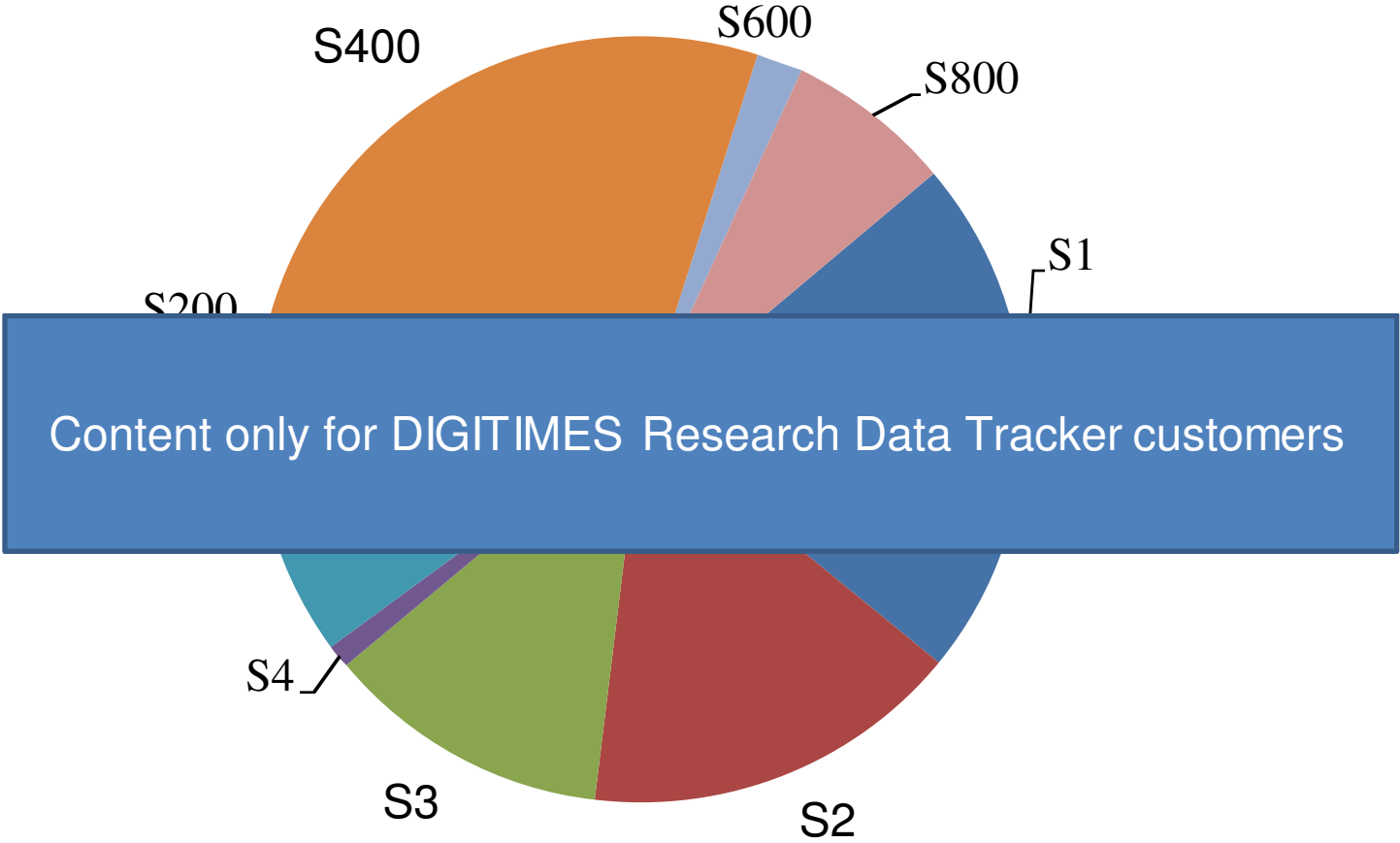
- Qualcomm shipments by baseband type, 1Q13-1Q14
- Qualcomm shipments by baseband type, 1Q13-1Q14
- Qualcomm shipments by baseband type, 1Q13-1Q14

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Qualcomm shipment share by architecture, 4Q13



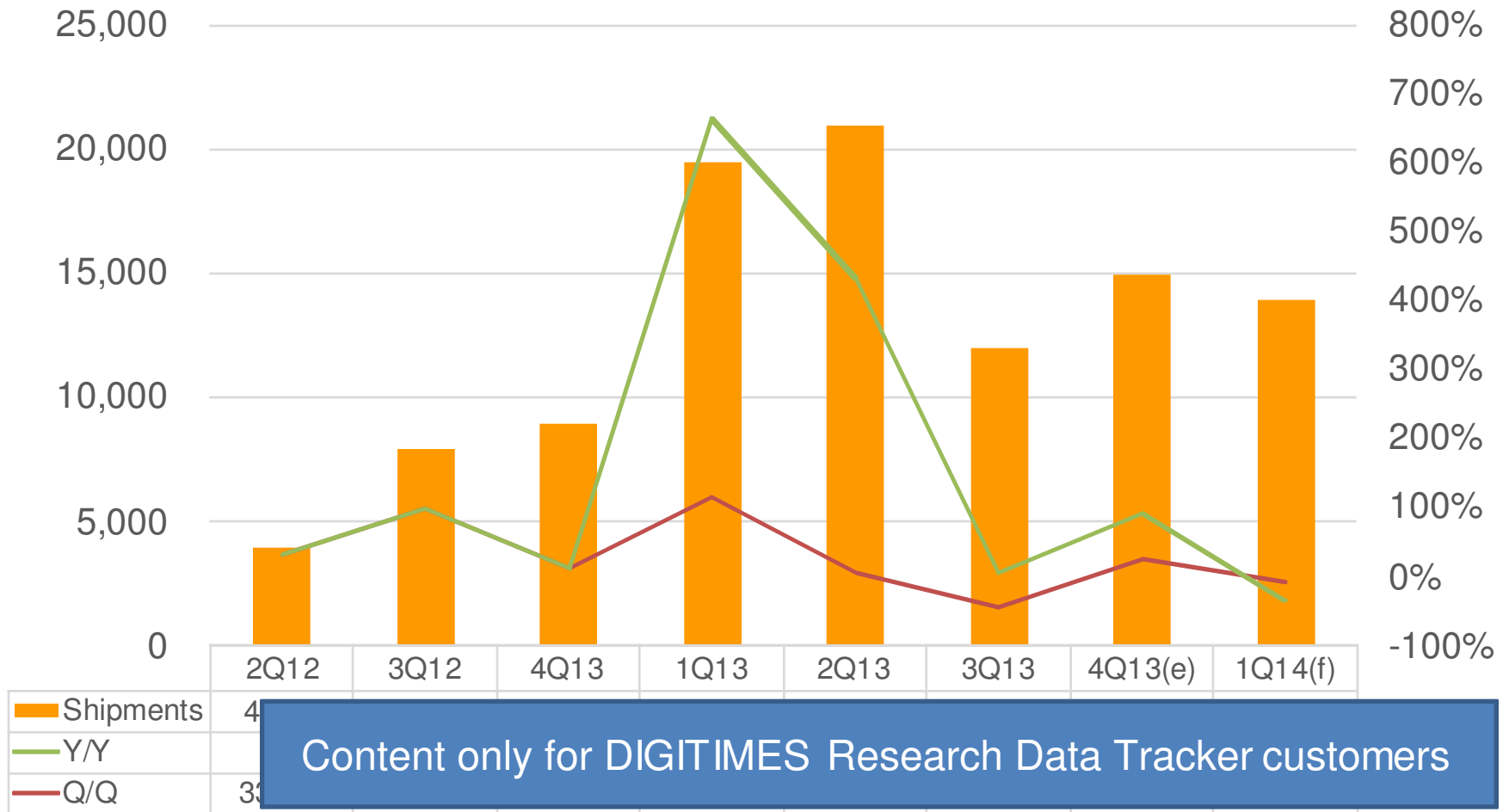
Qualcomm shipment share by architecture, 1Q14



Qualcomm shipment share by architecture, 1Q14



Spreadtrum smartphone AP shipments to China, 2Q12-1Q14 (k units)



Spreadtrum smartphone AP shipments to China, 2Q12-1Q14

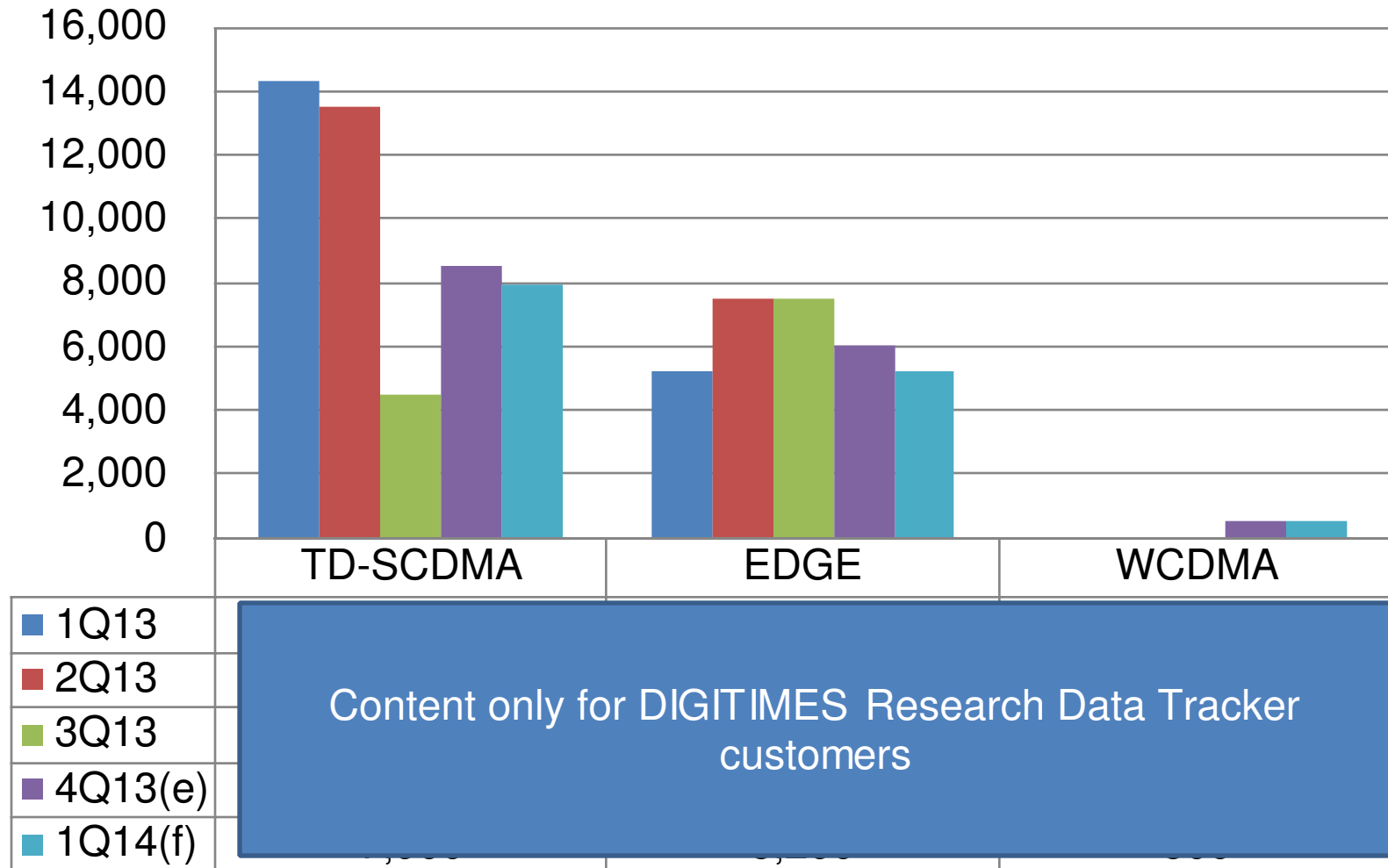
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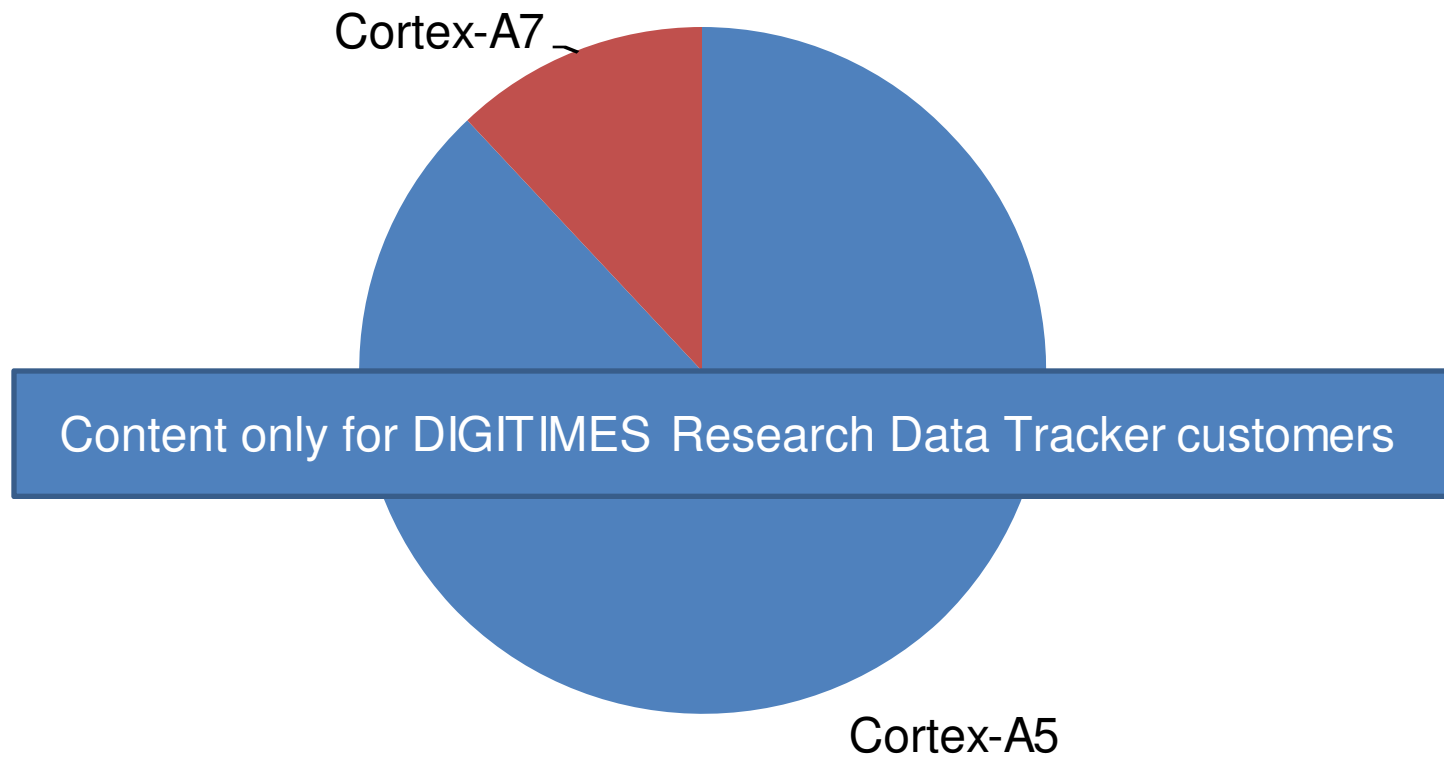
Spreadtrum shipments by baseband type, 1Q13-4Q14 (k units)



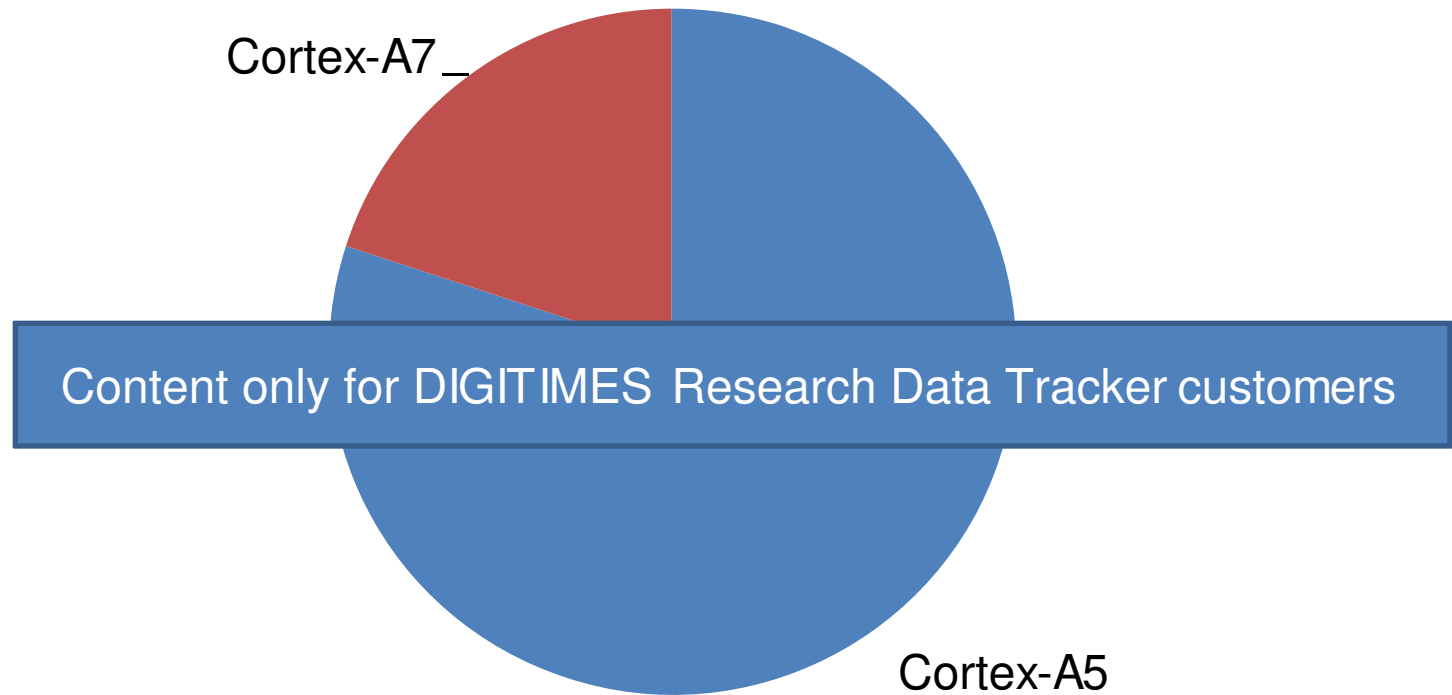
Spreadtrum shipments by baseband type, 1Q13-4Q14



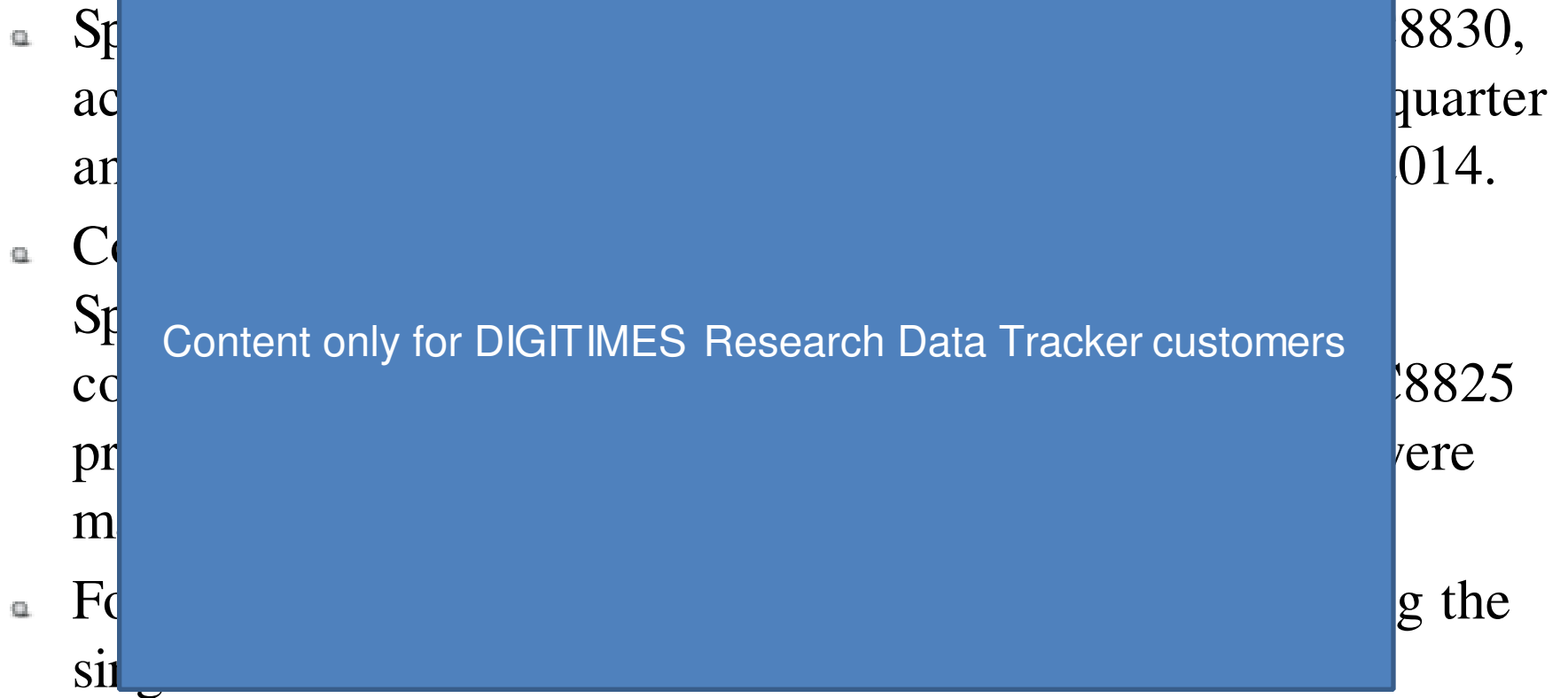
Spreadtrum shipment share by architecture, 4Q13



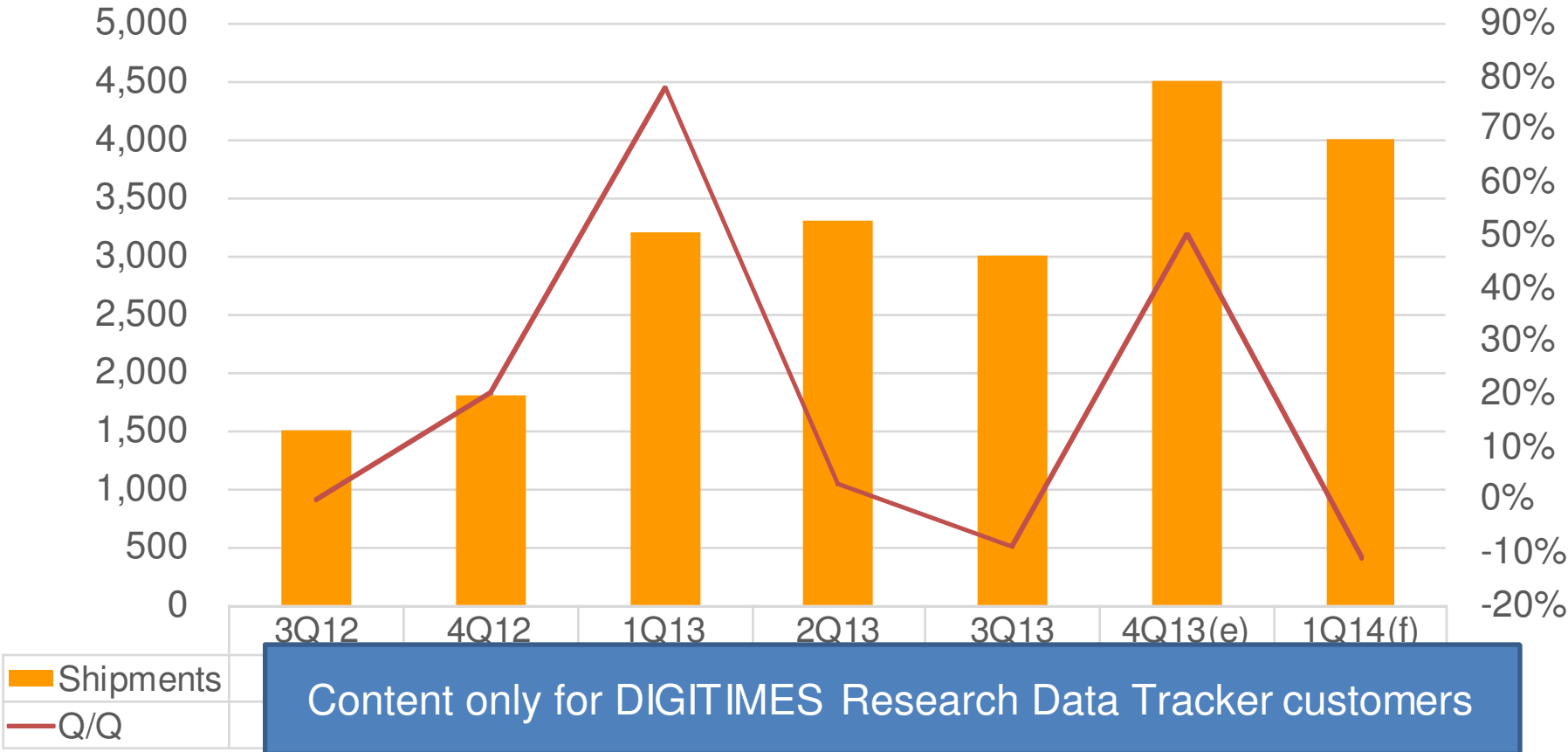
Spreadtrum shipment share by architecture, 1Q14



Spreadtrum shipment share by architecture, 1Q14



Leadcore smartphone AP shipments to China, 3Q12-1Q14 (k units)



Leadcore smartphone AP shipments to China, 3Q12-1Q14 (k units)

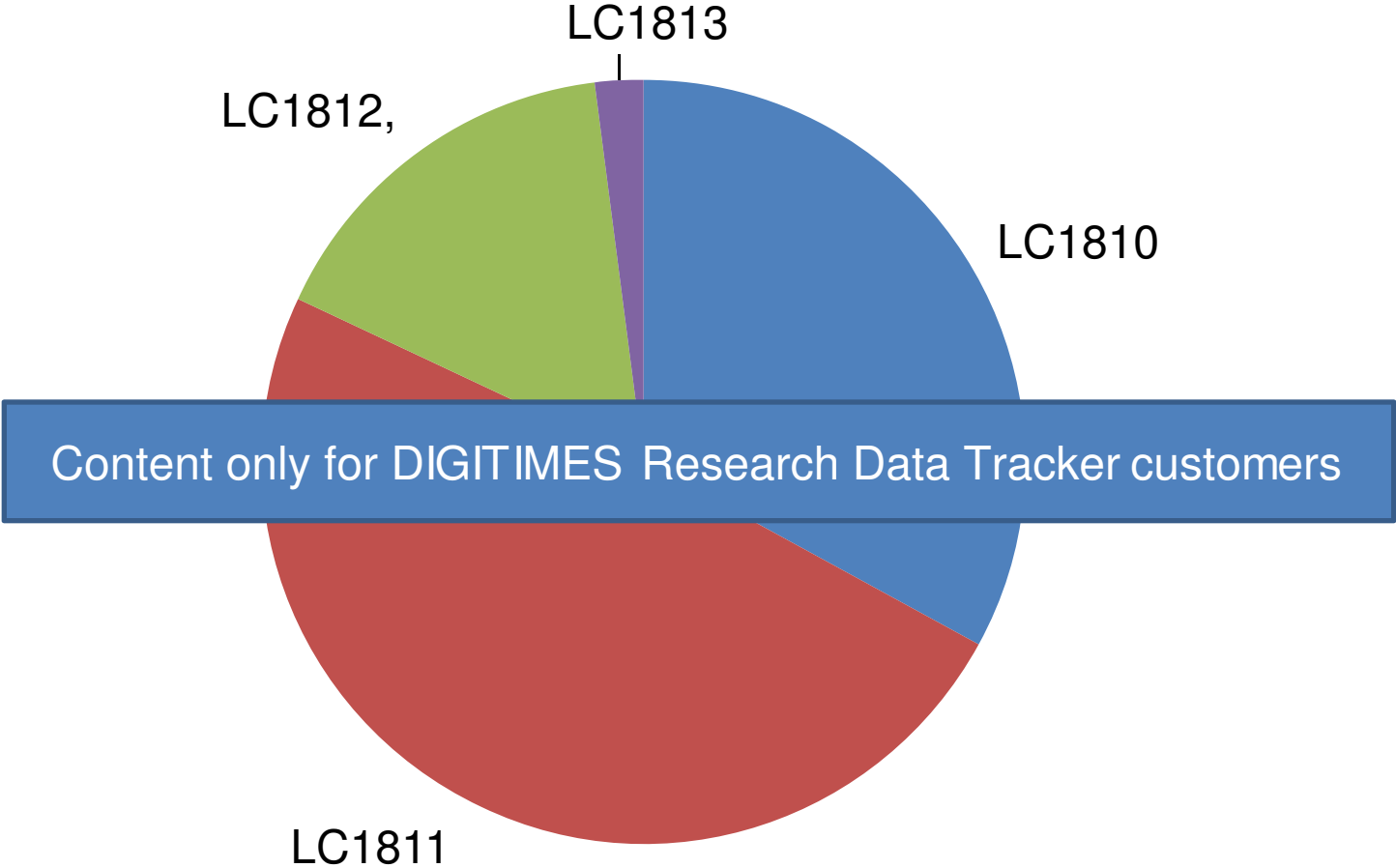
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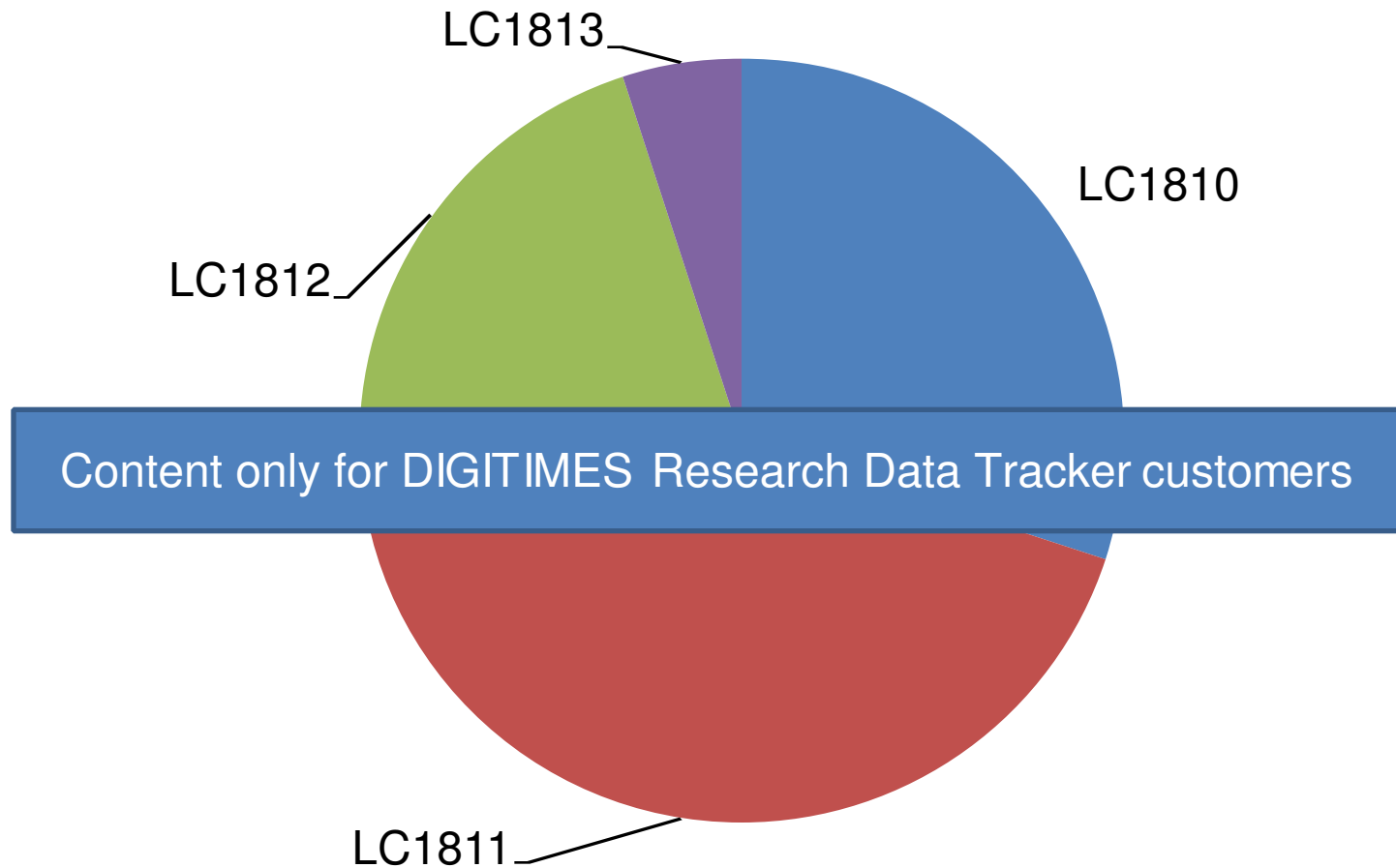
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Leadcore shipment share by architecture, 4Q13



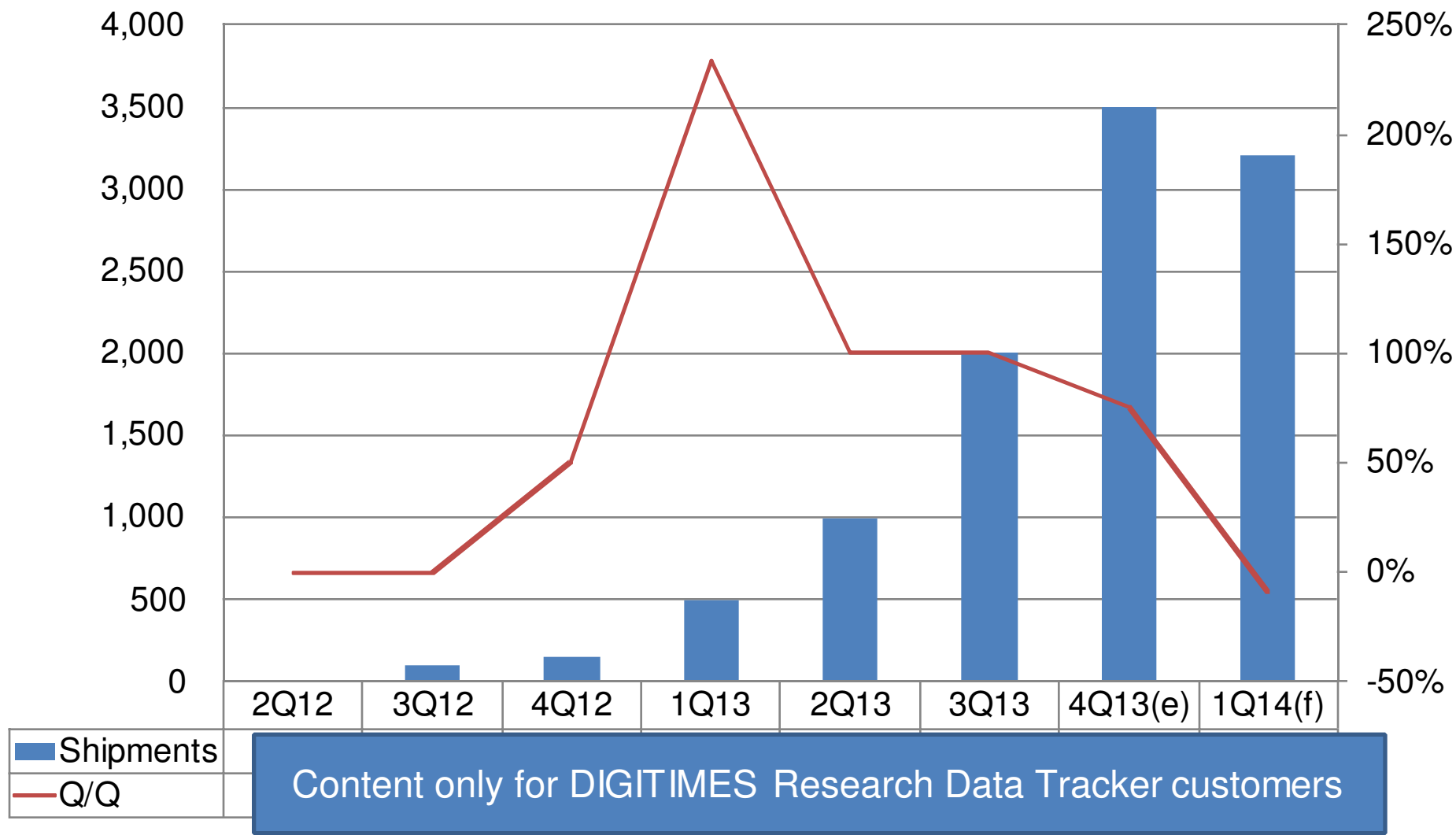
Leadcore shipment share by architecture, 1Q14



Leadcore shipment share by architecture, 1Q14

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HiSilicon smartphone AP shipments to China, 2Q12-1Q14 (k units)

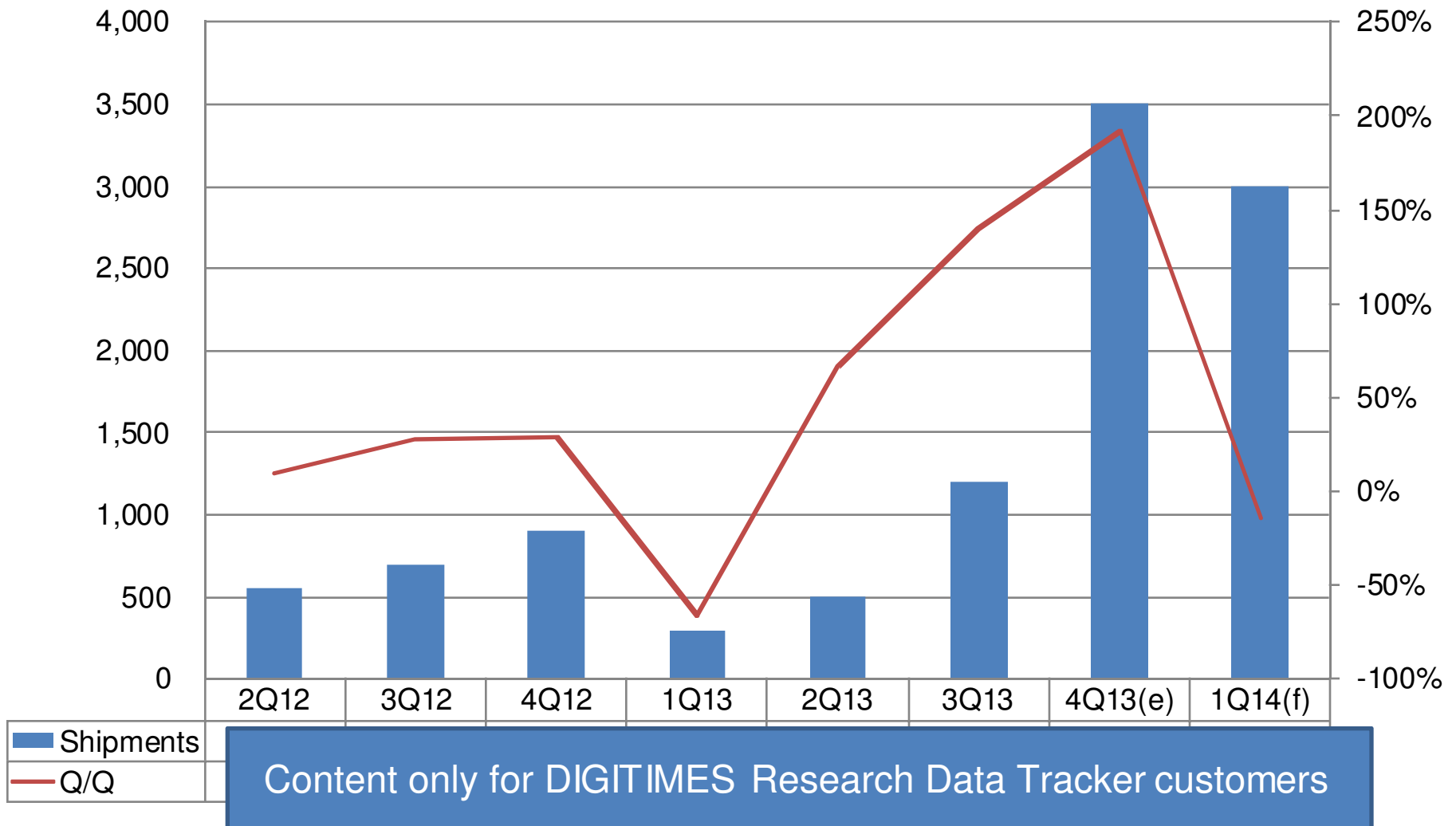


HiSilicon smartphone AP shipments to China, 2Q12-1Q14

- HiSilicon shipments to China in 2Q12 were 1.5 million units, accounting for 50% of total shipments. Shipments increased to 2.5 million units in 3Q12, 3.5 million units in 4Q12, and 4.5 million units in 1Q13. Shipments to China accounted for 60% of total shipments in 1Q13.
- Apple shipments to China in 2Q12 were 1.5 million units, accounting for 50% of total shipments. Shipments increased to 2.5 million units in 3Q12, 3.5 million units in 4Q12, and 4.5 million units in 1Q13. Shipments to China accounted for 60% of total shipments in 1Q13.

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Nvidia smartphone AP shipments to China, 2Q12-1Q14 (k units)



Nvidia smartphone AP shipments to China, 2Q12-1Q14 (k units)

- Nvidia has not had any shipments to China since 2Q12.
- While the company has not had any shipments to China since 2Q12, it has not had any shipments to China since 2Q12.
- In the first quarter of 2014, Nvidia's smartphone AP shipments to China were zero.



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