

## Forward Concepts Publishes Extensive Cellphone & Chip Market Study

*Report claimed to be the most comprehensive in both breadth and depth.*

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**Tempe, AZ May 21, 2008:** Forward Concepts has announced the publication of its newest in-depth annual study of the worldwide cellphone market and virtually all of the chips that go into them. The new 564-page study, "Cellular Handset & Chip Markets '08," gauges the performance of the top 38 handset vendors and ranks their 2007 market shares. The study provides dozens of detailed forecasts by technology and by global region through 2012 of handsets, subscribers and cellular handset chips of all types.

In addition, the report provides estimates of the market shares of cellphone vendors by air technology (GSM, GPRS, EDGE, CDMA2000 1xEV, 1xEV-DO, WCDMA, HSPA and even PHS/PDC/iDEN/TDMA). Even ultra-low-cost cellphones are forecast by air interface. Importantly, the study estimates market shares of chip vendors for every chip type and for every applicable air technology.

Market metrics are the central focus of the study, but some key findings are:

- Cellphone unit market growth is slowing globally to 10% 2008, as Japan growth turns negative, North America slows to 7.8% growth and Europe slows to only 3.8%.
- In spite of a slowing economy, Europe continues to be the fastest-growing market for WCDMA in 2008, pacing North America.
- China and India continue to be the volume cellphone drivers, but the smaller markets of Africa and the Middle East will experience far higher growth rates.
- HSDUPA is emerging in 2008, and will begin displacing WCDMA and HSDPA.
- EDGE markets will continue to grow in spite of excitement in 3G. Next-generation eEDGE will match first-generation WCDMA data rates at a much lower operator capital expense.
- The demand for voice-only, ultra-low-cost GSM/GPRS and CDMA2000-1x cellphones is growing rapidly and will dominate market volumes in emerging countries.
- Over the next five years, the fast-growing smartphone markets are driving introduction of single-chip peripherals that support Wi-Fi, Bluetooth, GPS, FM radio and even mobile TV.
- As the market for wireless payments expands, the demand for NFC radio and cellphone fingerprint sensors is also growing.
- Qualcomm's MediaFLO has achieved dominance in the U.S. mobile TV market, but Japan leads the market with ISDB-T followed by South Korea with T-DMB.
- The global fragmentation of mobile TV standards will lead to demand for multi-standard single-chip mobile TV receivers.
- Touch-screen controller growth is driven by the huge success of Apple's multi-touch iPhone and multi-touch screens are forecast to eventually displace single-touch ones.
- The mainstream cellphone camera market is migrating to 2 megapixels in 2008, as 3-megapixel volumes disappointed suppliers in 2007. However, with autofocus becoming a standard feature with them, we expect new 3-MP phones to see stronger 2009 growth.
- Application processor competition is heating up as the demand for increasing video and Web functionality grows with 3G's higher data rate.





According to the principal author, Carter L. Horney, "The cellphone continues to be the physical and market magnet that is pulling in the functionality of digital cameras, PDAs, MP3 players, GPS navigators, Bluetooth, FM Radio, mobile TV, cordless phones, smart cards and even fingerprint sensors, and is quickly becoming the dominant market for each and all of these functions. Our report covers all of these cellphone component markets, and companies making stand-alone versions of such products would be well-advised to understand how their market is affected by cellphones."

This study explores the market dynamics of each of these functions and profiles the chip providers and their market shares for each. And the study forecasts the markets for virtually all cellphone integrated circuits, including digital basebands, RF transceivers and PA's, application processors, graphics and other coprocessors, imagers, LCD drivers, touch-screen controllers, memories and chips for all the new functions being added to cellphones.

Will Strauss, Forward Concepts' president and editor of the report, said "Qualcomm and Texas Instruments continue to dominate the cellphone chip market but, with new peripherals being added, there opportunities for other vendors to target new chip types to get their piece of the market. And this valuable resource provides the key information needed for new business plans. We are confident that this study provides the most comprehensive coverage of cellphone and cellphone chip markets available."

The expanded 564-page study profiles over 100 companies and includes 74 figures and 96 tables plus appendix. It is available from Forward Concepts at:

[www.fwdconcepts.com/cell8.htm](http://www.fwdconcepts.com/cell8.htm)

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