

Global Mobile Phones Market: Key Research Findings 2013

◆ **Research Outline**

Yano Research Institute has conducted a study on the global mobile phones market with the following conditions:

1. Research period: March to October, 2013
2. Research target: domestic manufacturers of cell phone/smart phones, domestic semiconductor manufacturers, telecommunication businesses, and related organizations
3. Research methodologies: Face-to-face interviews by the specialized researchers, telephone/email surveys, and literature research

<What is the 4th Generation Mobile Phones Service (4G)?>

The fourth generation mobile smart phones service (4G) in this research includes LTE-Advanced and Wireless MAN-Advanced (WiMAX2) which are regulated in ITU (International Telecommunication Union), and also LTE (Long Term Evolution) and TD-LTE that belong to the 3.9 generation.

◆ **Key Findings**

■ **With Global Number of Mobile Phone Subscribers in 2013 Attains 7.1 Billion, Global Mobile Phone Penetration Ratio in 2014 Expected to Exceed 100%**

The global number of mobile phone subscribers reached 6,659.579 million in 2012, which can be converted to 94.4% of the penetration ratio against global population. The global number of subscribers in 2013 is anticipated to be 7,093.935 million, the penetration ratio 99.6%, the number of which is likely to increase in 2014 to 7,543.625 subscribers, the penetration ratio exceeding 100%.

■ **Global Number of 4G Contracts Anticipated to Attain 219.6 Million in 2013**

The fourth generation mobile smart phones service (4G) is provided by about 200 providers globally, mainly as commercial services. The number of 4G subscribers around the globe is anticipated to reach 219.60 million in 2013, which is likely to rise to 502.25 million in 2014 due to expected expansion of smart phones containing LTE devices.

■ **Total Global Shipment Volume of Feature Phones and Smart Phones in 2013 Reaches 1,807.06 Million**

The global shipment volume of feature phones and smart phones altogether in 2013 is anticipated to attain 1,807.059 million, among which the volume of smart phones shipped is 1,054.81 million, exceeding that of feature phones, 752.249 million.

◆ **Report format:**

Published report: “Global Market of Mobile Phones 2013-2014”

Issued on: October 30, 2013

Language: Japanese

Format: 464 pages in A4 format

Price: 262,500 yen (12,500 yen of consumption tax shall be charged for the sales in Japan.)

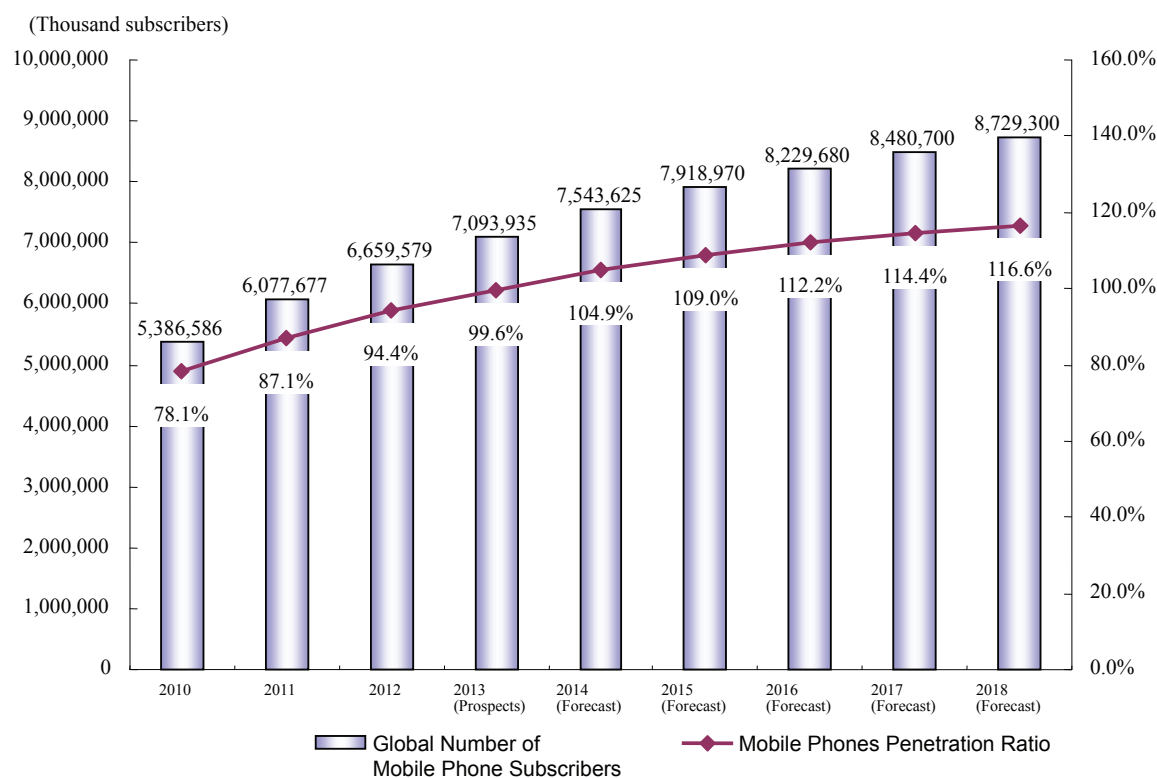
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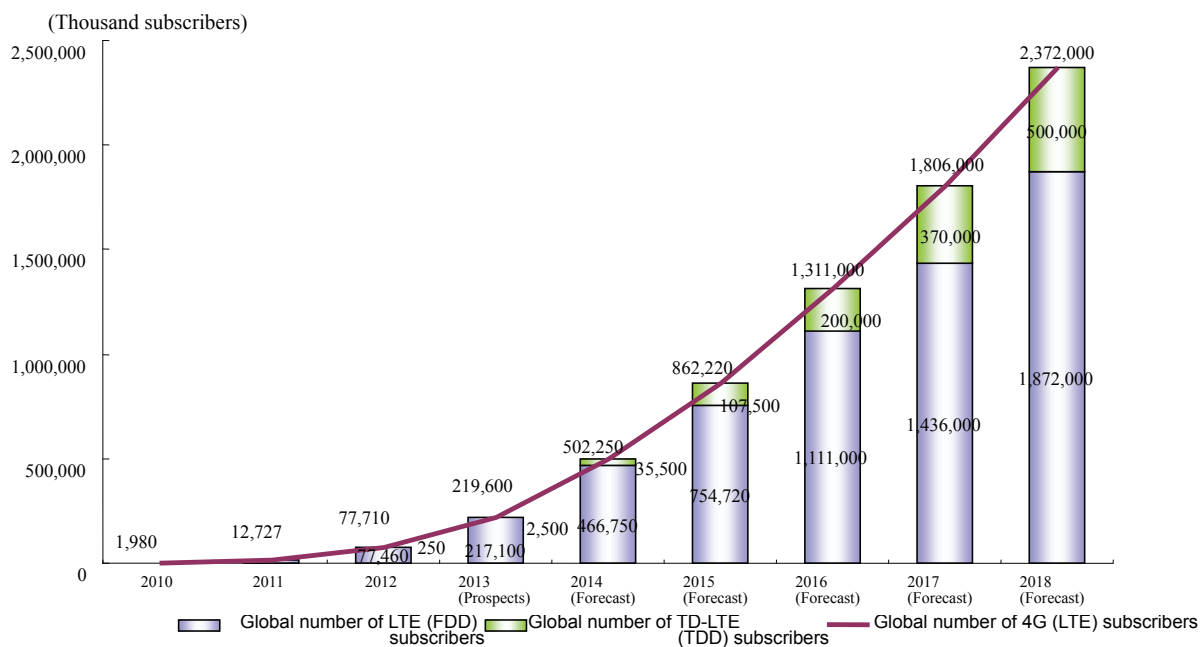
■ **Figure 1: Global Mobile Phones Market : Transition of Number of Subscribers and Penetration Ratio of Mobile Phones**



Notes:

1. The figures are based on the number of subscribers of mobile phone services.
2. The mobile phones penetration ratio is calculated based on the population statistics issued from UN, assuming that the global population will gradually increase.

■ **Figure 2: Global Mobile Phones Market : Transition of Number of 4G Subscribers**

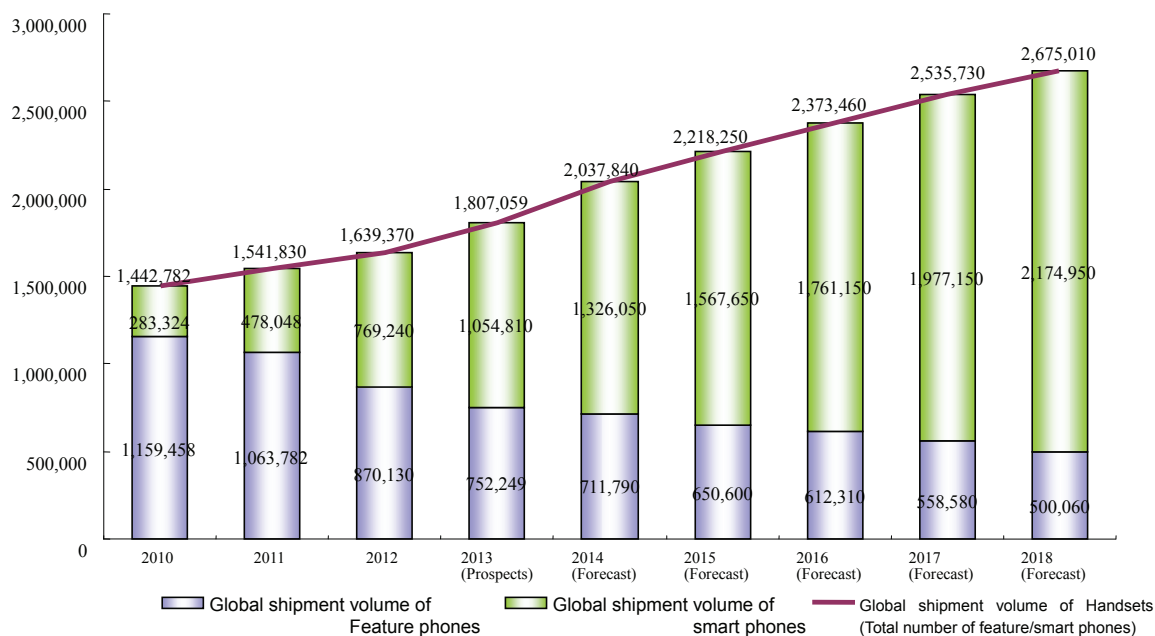


	2010	2011	2012	2013 (Forecast)	2014 (Forecast)	2015 (Forecast)	2016 (Forecast)	2017 (Forecast)	2018 (Forecast)
Global LTE (FDD) subscribers	1,980	12,727	77,460	217,100	466,750	754,720	1,111,000	1,436,000	1,872,000
Global TD-LTE (TDD) subscribers	0	0	250	2,500	35,500	107,500	200,000	370,000	500,000
4G(LTE) subscribers (TOTAL)	1,980	12,727	77,710	219,600	502,250	862,220	1,311,000	1,806,000	2,372,000

Notes:

3. The figures are based on the number of subscribers of 4G services.
4. LTE (FDD) includes GSM, UMTS (W-CDMA, HSPA), FDD/TDD (dual mode), LTE-Advanced.
5. TD-LTE (TDD) includes GSM, UMTS (W-CDMA, HSPA).

■ **Figure 3: Global Mobile Phones Market : Transition of Number of 4G Subscribers**

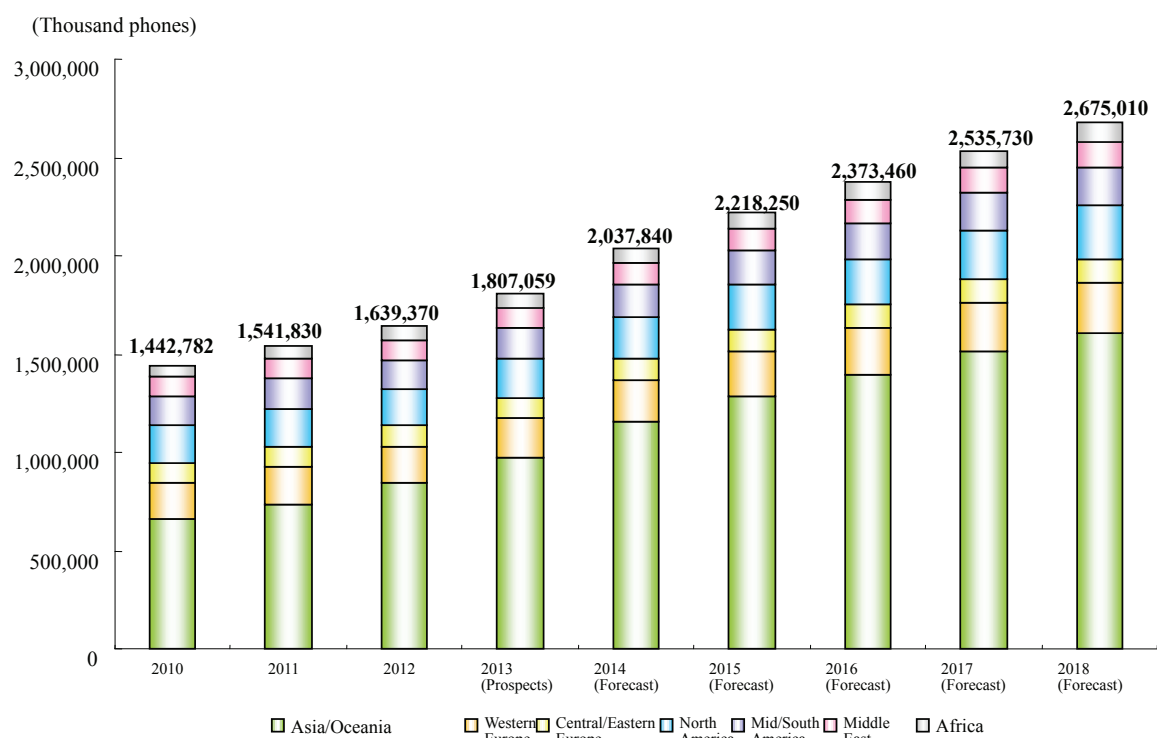


	2010	2011	2012	2013(Prospect)	2014(Forecast)	2015(Forecast)	2016(Forecast)	2017(Forecast)	2018(Forecast)
Global shipment volume of feature phones	1,159,458	1,063,782	870,130	752,249	711,790	650,600	612,310	558,580	500,060
Global shipment volume of smart phones	283,324	478,048	769,240	1,054,810	1,326,050	1,567,650	1,761,150	1,977,150	2,174,950
Global shipment volume of handsets (total)	1,442,782	1,541,830	1,639,370	1,807,059	2,037,840	2,218,250	2,373,460	2,535,730	2,675,010

Notes:

6. The figures are based on the shipment volume from manufacturers.

■ **Figure 4: Global Mobile Phones Market : Transition of Global Handsets (Total of Feature Phones and Smart Phones) Market by Region**



Region	2010	2011	2012	2013 (Prospect)	2014 (Forecast)	2015 (Forecast)	2016 (Forecast)	2017 (Forecast)	2018 (Forecast)
Asia/Oceania	657,915	734,309	840,150	975,999	1,156,930	1,286,450	1,392,760	1,510,630	1,607,110
Western Europe	190,600	191,616	189,250	196,800	209,630	226,400	237,500	247,000	255,300
Central/Eastern Europe	98,690	104,980	103,850	106,950	111,650	114,800	117,700	120,500	123,300
Northern America	186,930	192,405	186,300	196,300	211,300	221,800	237,000	252,200	267,400
Central/South America	146,720	150,710	149,260	153,900	162,170	173,600	184,300	192,600	200,900
Middle East	102,901	104,230	104,370	106,100	110,520	115,100	119,100	122,800	126,600
Africa	59,026	63,580	66,190	71,010	75,640	80,100	85,100	90,000	94,400
Global Shipment Volume of Handsets (total)	1,442,782	1,541,830	1,639,370	1,807,059	2,037,840	2,218,250	2,373,460	2,535,730	2,675,010

Notes:

7. The figures are based on the shipment volume from manufacturers.