

Mobile Phones Market: Key Research Findings 2014

◆ **Research Outline**

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

1. Research period: November 2013 to March 2014
2. Research target: Domestic mobile phone manufacturers, Japanese arms of overseas mobile phone manufacturers, domestic mobile communication service providers, domestic semiconductor manufacturers, and other organizations in the industry
3. Research methodologies: Face-to-face interviews, telephone/email surveys, and literature research

<What is an MVNO (Mobile Virtual Network Operator)? >

A wireless communications services provider that does not own the wireless network infrastructure over which the MVNO provides services to its customers. MVNO obtains network accesses to network services from a wireless service provider at whole sale prices, after which they sets retail price independently to customers.

◆ **Key Findings**

■ **Accumulated Number of Subscriptions of Domestic Mobile Communication Service in FY2014 Attains 159.9349 Million**

The accumulated number of subscriptions of domestic mobile communication services in FY2014 (ends in March 2015) is anticipated to be 159.9349 million. Although the number of new subscriptions for smartphones is slowing down, increase I expected in the number of subscriptions of MVNO services, and LTE-and-BWA combined services for smartphone users.

■ **Accumulated Number of Subscriptions of Domestic MVNO Services in FY2014 Projected to Achieve 19.700 Million**

The accumulated number of subscriptions of domestic MVNO services in FY2014 is anticipated to attain 19.700 million, which is 12.3% of the entire domestic mobile communication services.

■ **Domestic Shipment Volume of Handsets in FY2014 Declines to 33.270 Million, 0.8% of the Volume of Previous Year**

The domestic shipment volume of Handsets (total of feature phones and smartphones) is likely to decline to 33.270 million in FY2014. The breakdown of the forecast is as follows: Number of feature phones shipped is projected to be 3.96 million, down by 17.5%, and number of smartphones shipped is to be 29.31 million, up by 2%.

◆ **Report format:**

Published report: “Mobile Phones Market 2013-2014”

Issued on: March 26, 2014

Language: Japanese

Format: 317 pages in A4 format

Price: 180,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

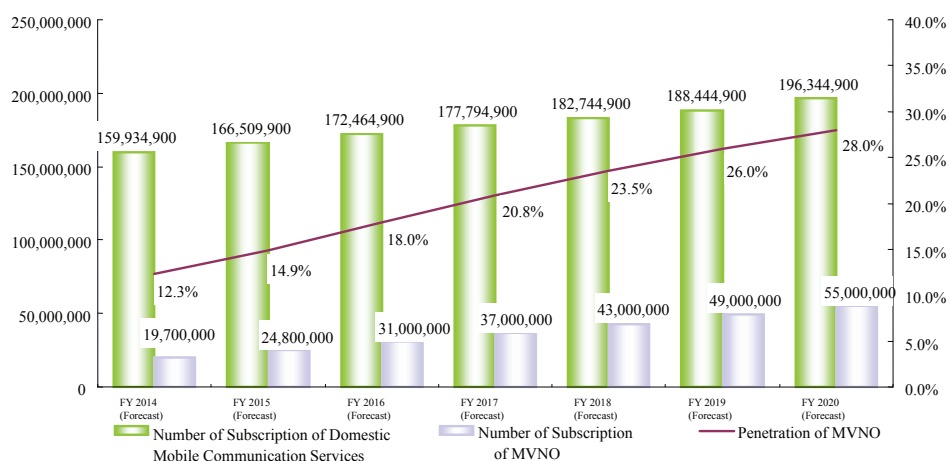
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■ **Figure/Table 1: Forecast of Number of Subscription of Domestic Mobile Communication Services and MVNO Services**

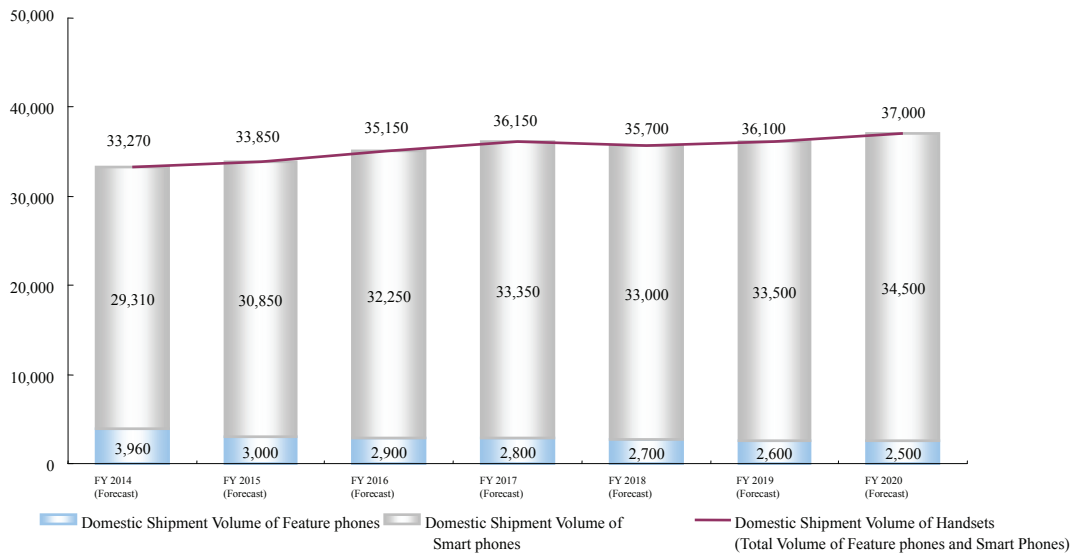


	FY2014 (Forecast)	FY 2015 (Forecast)	FY2016 (Forecast)	FY2017 (Forecast)	FY2018 (Forecast)	FY2019 (Forecast)	FY2020 (Forecast)
No. of subscriptions of mobile com. services	159,934,900	166,509,900	172,464,900	177,794,900	182,744,900	188,444,900	196,344,900
No. of subscriptions of MVNO services	19,700,000	24,800,000	31,000,000	37,000,000	43,000,000	49,000,000	55,000,000
Penetration of MVNO services	12.3%	14.9%	18.0%	20.8%	23.5%	26.0%	28.0%

Notes:

1. The figures are based on shipment volume of manufacturers by fiscal year (from April to March).

■ **Figure/Table 2: Forecast of Domestic Shipment Volume of Handsets (Total of Feature Phones and Smartphones)**



	FY2014 (Forecast)	FY2015 (Forecast)	FY2016 (Forecast)	FY2017 (Forecast)	FY2018 (Forecast)	FY2019 (Forecast)	FY2020 (Forecast)
Shipment Volume of Feature phones	3,960	3,000	2,900	2,800	2,700	2,600	2,500
Shipment Volume of Smart phones	29,310	30,850	32,250	33,350	33,000	33,500	34,500
Shipment Volume of Handsets (total)	33,270	33,850	35,150	36,150	35,700	36,100	37,000

Notes:

2. The figures are based on shipment volume of manufacturers by fiscal year (from April to March).