

Smart Phone Market in Japan: Key Research Findings 2011

◆ Research Outline

Yano Research Institute has conducted a study on smart phone market with the following conditions:

1. Research period: March to June, 2011
2. Research target: Domestic mobile communication service providers, domestic cell phone manufacturers, cell phone/smart phone manufacturers overseas, contract manufacturers overseas, PC makers overseas, domestic component manufacturers, and other organizations in the industry
3. Research methodologies: Face-to-face interviews, telephone/email surveys, and literature research

<What is a smart phone?>

A smart phone in this research is defined as follows:

1. Terminal that can enhance and customize functions by installing applications
2. be equipped with universal OS
3. be equipped with verbal communications and internet browser functions
4. be able to align with PCs and cell phones
5. be able to develop applications in an open platform
6. be equipped with a display of less than 5.0 inches
7. be optimized by the "internet."

◆ Key Findings

■ **Domestic shipment for smart phones in FY 2010 rose to 8.508 million**

Smart phone market has surely gained its momentum after its environment has improved. Providers did not miss a chance to announce their new versions one after another since the year-end shopping season. Such an industrial move led smart phones in FY2010 to mark 8.508 million in domestic shipment, 391.2% of the previous year. (Domestic shipment in FY2009 was 2.175 million)

■ **Domestic shipment for smart phones in FY 2011 is expected to be 21.31 million**

Smart phone is considered as the leading product in the domestic market, where communications providers intensify the product lines for it. As major domestic and international manufacturers focus on preparing varying combination of smart phone products, those smart phones are predicted to dominate more than half of domestic shipment of mobile communication terminals.

■ **Global shipment for smart phones in FY 2010 to be 295.936 million**

Global shipment for smart phones in FY 2010 rose to 295.936 million, 156.1% of the previous year (global shipment in FY2009 was 189.554 million.) It was because of the dramatic rise in demand from

those developing and emerging countries in Asia and Mid- to South Americas, in addition to already-established markets in Europe and Americas. Also, it was because large-scale mobile phone manufacturers have fully entered into the market, increasing the global shipment of smart phones equipped with open platforms.

■ **Global shipment for smart phones in FY2011 expected to be 483.743 million**

It is expected that global shipment for smart phones in FY 2011 will be 483.743 million, 163.4% of the previous year. Although the market is facing potential risk of shortage in phone components and materials due to an aftermath of the Great East Japan Earth Quake, the demand for smart phones seems to become stronger towards the year-end shopping season, surpassing the anxieties.

◆ **Report format:**

Published report: “World Smartphones, Tablets and Mobile Data Terminals Market 2011 to 2012”

Issued on: June 30, 2011

Language: Japanese

Format: 450 pages in A4 format

Price: 210,000 yen (10,000 yen of consumption tax shall be charged for the sales in Japan.)

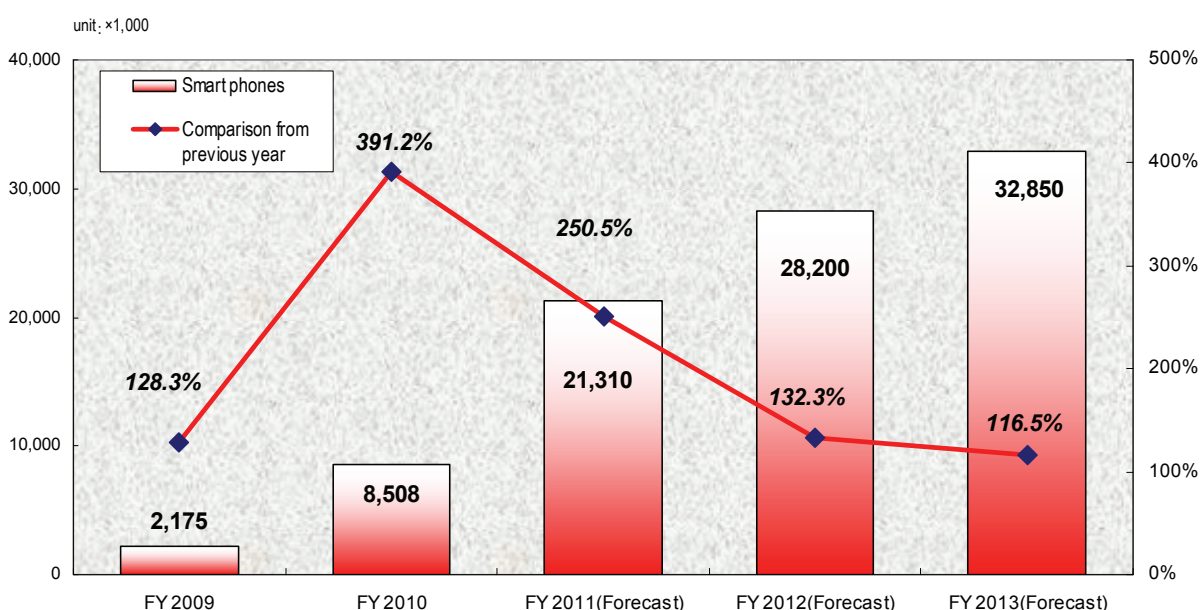
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	FY 2009	FY 2010	FY 2011(Forecast)	FY 2012(Forecast)	FY 2013(Forecast)
Smart phones	2,175	8,508	21,310	28,200	32,850
Comparison from previous year	128.3%	391.2%	250.5%	132.3%	116.5%



	2009	2010	2011(forecast)	2012(forecast)	2013(forecast)	2014(forecast)	2015(forecast)	2016(forecast)	2017(forecast)
Smart phones	189,554	295,936	483,743	636,639	806,435	966,986	1,140,415	1,317,687	1,484,790
Global cell phone market size	1,193,155	1,329,830	1,470,515	1,594,825	1,706,955	1,806,630	1,906,910	1,995,380	2,087,500
		156.1%	163.5%	131.6%	126.7%	119.9%	117.9%	115.5%	112.7%

