

Global ICT Industry and Market Report: 2013 Edition

<https://marketpublishers.com/r/G6165C3B930EN.html>

Date: September 2013

Pages: 179

Price: US\$ 3,800.00 (Single User License)

ID: G6165C3B930EN

Abstracts

The rigid economic conditions in 2012 stemming from the European debt crisis, slow recovery of mature economies, and less expected growth in the emerging markets had caused government and enterprise sectors to cut down their spending and led to low consumer confidence. Improved broadband service quality and increased income per capita in emerging countries have made smart handheld devices and other consumer electronic devices the engine of growth for the ICT Industry. This report profiles the development of motherboard, notebook PC (including netbook), server, tablet, smartphone, large-, medium, and small LCD panels, LCD TV, and DSC (Digital Still Camera) in 2013 and examines their future trends beyond.

Contents

1.THE MOTHERBOARD INDUSTRY

- 1.1 Definition and Scope
- 1.2 Shipment Volume and Value
- 1.3 Industry Characteristics
 - 1.3.1 Favorable Factors
 - 1.3.2 Detrimental Factors
- 1.4 Industry Value Chain
 - 1.4.1 Upstream Players
 - 1.4.1.1 Intel
 - 1.4.1.2 AMD
 - 1.4.2 Midstream Players
 - 1.4.2.1 Hon Hai
 - 1.4.2.2 Pegatron
 - 1.4.2.3 Gigabyte
 - 1.4.2.4 MSI
 - 1.4.2.5 ECS
 - 1.4.3 Downstream Players
 - 1.4.3.1 ASUS
 - 1.4.3.2 ASRock
- 1.5 Industry Outlook
 - 1.5.1 Shipment Volume and Value Forecast
 - 1.5.2 Industry Clusters
 - 1.5.3 Technology Development
 - 1.5.3.1 Introduction to Next-generation SoC Architecture
 - 1.5.3.2 Intel's Aggressive Promotion of Thunderbolt as Next Generation High-speed Interface
 - 1.5.4 Product Development
 - 1.5.4.1 Leading Component Vendors' Continuous Launch of Next-generation Platforms
 - 1.5.4.2 Product Differentiation via Software and Function Chips
 - 1.5.5 Regional Market Development
 - 1.5.5.1 North America
 - 1.5.5.2 Western Europe
 - 1.5.5.3 Japan
 - 1.5.5.4 China and Asia Pacific
 - 1.5.5.5 Other Emerging Markets

1.6 Opportunities and Challenges

1.6.1 Constant Declines in Motherboard Market Demand

1.6.2 Niche and Customized Products Key to Profits

1.6.3 Industry Competition Intensifying on Platform Structure Changes

2. THE NOTEBOOK PC INDUSTRY

2.1 Definition and Scope

2.2 Industry Profile

2.2.1 Industry Lifecycle

2.2.2 Shipment Volume and Value

2.3 Industry Characteristics

2.3.1 Favorable Factors

2.3.1.1 Economies of Scale

2.3.2.2 Customization

2.3.2.3 Global Logistics

2.3.2.4 R&D

2.3.3 Detrimental Factors

2.3.3.1 Capital

2.3.3.2 Key Component Supply

2.3.3.3 Threats from Other Mobile Devices

2.4 Industry Value Chain

2.4.1 Upstream, Midstream, and Downstream Players

2.5 Industry Outlook

2.5.1 Notebook PC Shipment Volume and Value Forecasts

2.5.2 Industry Development Forecast

2.5.2.1 Supply

2.5.2.2 Demand

2.6 Opportunities and Challenges

3. THE SERVER SYSTEM INDUSTRY

3.1 Definition and Scope

3.1.1 By Instruction Set and CPU

3.1.2 By Product Form Factor

3.2 Industry Profile

3.2.1 Industry Lifecycle

3.2.2 Shipment Volume and Value

3.3 Industry Characteristics

3.3.1 Favorable Factors

3.3.1.1 Enhance Competitive Edges on Integrated Software and Hardware Solutions

3.3.1.2 Expanding Cloud Computing Business and Vying for Diverse Business

Opportunities and Data Center Demand

3.3.2 Detrimental Factors

3.4 Industry Value Chain

3.5 Industry Development Outlook

3.5.1 Volume and Value Forecast

3.5.2 Industry Development Forecast

3.6 Opportunities and Challenges

3.6.1 Branded Vendors Drive Hardware Sales with Integrated Solutions

3.6.2 x86 Replacing RISCs as Lower Cost Option

4. THE TABLET INDUSTRY

4.1 Definition and Scope

4.2 Industry Profile

4.2.1 Industry Lifecycle

4.2.2 Shipment Volume and Value

4.2.2.1 Apple Shifts to Diverse Product Line-ups

4.2.2.2 Samsung Creates Product Differentiation

4.2.2.3 Amazon and Google Spark Low-priced Tablet Demand

4.2.2.4 White-box Vendors Enter Emerging Markets with Ultra-low price Strategies

4.3 Industry Characteristics

4.3.1 Favorable Factors

4.3.1.1 Abundant applications and digital content

4.3.1.2 Innovative Hardware Design Capability

4.3.1.3 Diversified Product Portfolios

4.3.2 Detrimental Factors

4.3.2.1 Key Component Supply

4.3.2.2 Replacement of Large Panel Mobile Phones

4.3.3 Upstream, Midstream, and Downstream Players

4.4 Industry Outlook

4.4.1 Shipment Volume and Value Forecast

4.4.1.1 Supply

4.4.1.2 Demand

4.5 Opportunities and Challenges

5. THE SMARTPHONE INDUSTRY

5.1 Definition and Scope

5.2 Industry Profile

5.2.1 Shipment Volume and Value

5.3 Industry Characteristics

5.3.1 Android Division of Work Between Software and Hardware in A Mutual-Beneficial Relationship

5.3.2. iOS Perfect Combination of Software and Hardware

5.3.3 Windows: Close Cooperation Between Software and Hardware

5.4 Industry Value Chain

5.4.1 Upstream Players

5.4.1.1 Baseband ICs

5.4.1.2 Application Processors

5.4.2 Midstream Players

5.4.3 Downstream Players

5.4.4. SWOT Analsis

5.4.4.1 Strengths

5.4.4.2 Weaknesses

5.4.4.3 Opportunities

5.4.4.4 Threats

5.5 Industry Competition

5.6 Opportunities and Challenges

5.6.1 Settlement on Patent Lawsuits

5.6.2 Operating System Market Divided up by Three Leaders

6. THE LARGE-SIZED LCD PANEL INDUSTRY

6.1 Definition and Scope

6.1.1 Product Definition

6.1.2 Differences in Specification of Main Products

6.1.3 Industry Scope

6.2 Industry Development

6.2.1. Industry Characteristics

6.2.1.1 Production Modes

6.2.1.2 High Share of Cost by Equipment Amortization Expenditure

6.2.1.3 Close Relationship with Upstream Suppliers

6.2.1.4 Vertical Integration with Downstream Influences Panel Product

Competitiveness

6.2.1.5 Panel Supply Status Influences Product Prices

- 6.2.2 Shipment Volume and Value
- 6.2.3 Major Applications for Panels
 - 6.2.3.1 Panel Shipments for Main Applications
 - 6.2.3.2 Vendor Ranking by Shipment Volume
 - 6.2.3.3 Mainstream Panel Price
- 6.2.4. Development of Vendors
 - 6.2.4.1 Samsung Display
 - 6.2.4.2 Sharp
- 6.3 Industry Outlook
 - 6.3.1 Shipment Forecast
 - 6.3.2 Demand and Supply Forecast
 - 6.3.3 Development Highlights
 - 6.3.3.1 Modularized Ultrabook Panels
 - 6.3.3.2 Open Cells Become Shipment Model
- 6.4. Opportunities and Challenges
 - 6.4.1 Growth of LCD Panel Production Capacity Slows Down
 - 6.4.2 Displays Become Key Differentiation for Notebook PCs
 - 6.4.3 Competition among Notebook PC Brands Changes

7. THE LCD TV INDUSTRY

- 7.1 Definition and Scope
- 7.2 Industry Development
 - 7.2.1 Industry Profile
 - 7.2.1.1 Need for New Applications
 - 7.2.1.2 Shipment Volume and Value
 - 7.2.2 Industry Characteristics
 - 7.2.2.1 High Industry Concentration
 - 7.2.2.2 Intensified Cooperation between Upstream and Downstream
 - 7.2.2.3 New Product Function Development Speeds Up
 - 7.2.3 LCD TV Industry Value Chain
- 7.3 Industry Outlook
 - 7.3.1 Shipment Volume and Value Forecast
 - 7.3.1.1 Replacement Demand and Analog-to-digital Conversion in Emerging Markets to Drive LCD TV Industry Growth
 - 7.3.2 Development of Japanese and Chinese TV Brands
 - 7.3.3 Cooperation between Service Providers and TV Vendors
- 7.4 Opportunities and Challenges
 - 7.4.1 Innovative Applications and Products

- 7.4.1.1 Rising Importance of Ultra High Resolution
- 7.4.1.2 New Business Opportunities from Special- and Large-sized Products
- 7.4.1.3 Emergence of Low-priced Direct-lit LED TVs
- 7.4.2 Taiwanese Supply Chain Paying Close Attention to Apple iTV Development
- 7.4.3 Industrial Integration Accelerates Smart TV Platform Development
- 7.4.4 Diversification of Smart TV HMI

8. THE SMALL- AND MEDIUM-SIZED LCD PANEL INDUSTRY

- 8.1 Definition and Scope
 - 8.1.1 a-Si TFT LCD
 - 8.1.2 LTPS TFT LCD
 - 8.1.3 AMOLED
 - 8.1.4 Cell Panel
 - 8.1.5 TFT LCD Module
- 8.2 Industry Profile
 - 8.2.1 Shipment Volume and Value
- 8.3 Industry Characteristics
 - 8.3.1 Favorable Factors
 - 8.3.2 Detrimental Factors
- 8.4 Industry Value Chain
 - 8.4.1 Enhance Product Integration Value
 - 8.4.2 Increased Importance of Chinese Customers

9. THE DIGITAL STILL CAMERA INDUSTRY

- 9.1 Definition and Scope
- 9.2 Industry Profile
 - 9.2.1 Industry Lifecycle
 - 9.2.2 Overall Shipment Volume/Value
- 9.3 Industry Characteristics
- 9.4 Favorable Factors
 - 9.4.1 Branded Vendors
 - 9.4.2 Contract Manufacturers
- 9.5 Detrimental Factors
 - 9.5.1 Camera Phones Cannibalizing the DSC Market
 - 9.5.2 Product Differentiation Becomes an Issue
- 9.6 Industry Value Chain
 - 9.6.1 Downstream Players

9.6.2 Midstream Players

9.6.3 Upstream Players

9.6.3.1 Chipmakers

9.6.3.2 Camera Len Manufacturers

9.6.3.3 Image Sensor Manufacturers

9.6.3.4 TFT-LCD Panel Manufacturers

9.7 Industry Outlook

9.7.1 Shipment Volume and Value Forecast

9.7.2 Development Highlights

9.7.2.1 High-end Branded DSCs Focus on Product Differentiation and Profitability

9.7.2.2 CMOS Image Sensors' Share to Top over 50% in 2013

9.7.2.3 Digital Cameras Becoming Wi-Fi Connected to Compete with Camera

Phones

9.7.3 Opportunities and Challenges

9.7.3.1 Pricing Becoming Polarized in the DSC Market

9.7.3.2 MILC's Continued Growth Momentum Eroding DSC Market Share

9.7.3.3 Competition in MILC to Become Fiercer

APPENDIX

List Of Tables

LIST OF TABLES

Table 1 Companies in the Downstream, Midstream, and Upstream Sectors of the Smartphone Industry

Table 2 TFT-LCD Panel Applications by Product Type

Table 3 TFT-LCD Panel Applications and Suppliers

Table 4 Chinese Large-sized Panel Module Suppliers and Their Distribution

Table 5 Global Top-five Panel Component Suppliers, 2012

Table 6 Global Top Five Branded Vendors' Branded/Contract Customer Share

Table 7 Global Top-five Panel Component Suppliers, 2012

Table 8 Large-sized TFT-LCD Supplier Shipment Volume Ranking, 2011 - 2012

Table 9 International LCD TV Market Share by Branded Vendor, 2011 - 2012

Table 10 International Smartphone Branded Vendors' Products and Their Features139

List Of Figures

LIST OF FIGURES

Figure 1 Worldwide Motherboard Industry Shipment Value and YoY Growth, 2010 - 2012

Figure 2 Worldwide Motherboard Shipment Volume and YoY Growth, 2010 - 2012

Figure 3 Companies in the Upstream, Midstream and Downstream Sectors of the Motherboard Industry

Figure 4 Worldwide Motherboard Industry Shipment Volume and Value Forecasts, 2012 - 2017

Figure 5 Worldwide Notebook PC Shipment Volume and Value, 2010 - 2012

Figure 6 Companies in Downstream, Midstream, and Upstream Sectors of the Notebook PC Industry

Figure 7 Worldwide Notebook PC Shipment Volume and Value Forecasts, 2012 - 2017

Figure 8 Server Product Breakdown by Type of Applications, Form Factors, Operating Systems, and CPUs

Figure 9 The Product Lifecycle of the Server Industry

Figure 10 Worldwide Server System Shipment Volume and Value, 2010 - 2012

Figure 11 Companies in the Downstream, Midstream, and Upstream Sectors of the Server System Industry

Figure 12 Worldwide Server System Shipment Volume and Value Forecasts, 2012 - 2017

Figure 13 Tablet Industry Lifecycle

Figure 14 Worldwide Tablet Shipment Volume and Value, 2010 - 2012

Figure 15 Companies in the Downstream, Midstream, and Upstream Sectors of the Tablet Industry

Figure 16 Worldwide Tablet Shipment Volume and Value Forecasts, 2012 - 2017

Figure 17 Worldwide Smartphone Shipment Volume and Value, 2010 - 2012

Figure 18 Worldwide Smartphone Market Share by Branded Vendor, 2012

Figure 19 Worldwide Smartphone Shipment Volume and Value Forecasts, 2012 - 2017

Figure 20 Large-sized LCD Panel Industry Landscape

Figure 21 Global Large-sized LCD Panel Shipment Volume and Value, 2010 - 2012

Figure 22 Global Large-sized LCD Panel Shipment Volume by Application Type, 2010 - 2012

Figure 23 Large-sized LCD Panel ASP, 2Q 2011 - 4Q 2012

Figure 24 Global Large-sized TFT-LCD Panel Shipment Volume and Value Forecasts, 2012 - 2017

Figure 25 Global Large-sized TFT-LCD Panel Supply and Demand, 1Q 2012 - 4Q 2013

Figure 26 Companies in the Downstream, Midstream, and Upstream Sectors of the LCD TV Industry

Figure 27 Global LCD TV Shipment Volume and Value, 2010 - 2012

Figure 28 TV Product Feature Development Roadmap

Figure 29 Global LCD TV Shipment Volume and Value Forecasts, 2012 - 2017

Figure 30 Global LCD TV Market Share by Branded Vendor

Figure 31 Global LCD TV Vendors and Connected TV Devices

Figure 32 Global Small- and Medium-sized LCD Panel Shipment Volume, 2010 - 2012

Figure 33 Global Small- and Medium-sized TFT-LCD Panel Shipment Value, 2010 - 2012

Figure 34 Companies in the Upstream, Midstream and Upstream Sectors of the Projected Capacitive Touch Panel Industry

Figure 35 Worldwide Digital Still Camera Shipment Volume, 2010 - 2012

Figure 36 Worldwide Digital Still Camera Shipment Value, 2010 - 2012

Figure 37 Digital Still Camera BOM Cost Structure

Figure 38 Digital Still Camera Market Share by Branded Vendor, 2011 - 2012

Figure 39 Companies in the Downstream, Midstream, and Upstream Sectors of the DSC Industry

Figure 40 Worldwide Digital Still Camera Shipment Volume, 2012 - 2017

Figure 41 Worldwide Digital Still Camera Shipment Value, 2012 - 2017

LIST OF COMPANIES

Companies and organizations analyzed or mentioned in the report include:

3Com, Ability, Accusys, Acer, Adapter, ADI, Alcor Micro, Alibaba.com, Alltop, Allwinner, Altek, Amazon, Ambarella, AMD, AMI, Angilent, Aopen, Apacer, Apitech, Apple, Aptina, Asia Optical, ASMedia, ASRock, ASUS, AT&T, ATL, Atmel, AUO, AVY, Barnes & Noble, Beko, BenQ, BenQ Materials, Biostar Microtech, BOE, Breviow, Broadcom, BTC, Cando, Canon, Casio, Catcher Technology, CEC, Celxpert, Changhong, Chicony, Chimei Materials, China Mobile, Clevo, CMCS, Colorful, Compal, Comtech, CPT, CSOT, Cthim, Cypress, Da Ang, Darfon, Dell, Delta Electronics, DiBcom, Dynamic Electronics, DynaPack, ECS, EETI, Elan Microelectronic, Emerson, Eternal Chemical, Everlight, FIH, FITTEC, Flextronics, Forehouse, Forward Electronics, Foxconn, Foxlink, FSP Group, Fujifilm, Gamen, Gatex, GBM, Genesis, Getac, Giantplus, Gigabyte, GIO Opto, GMT, Gold Circuit, Google, H&T, Hannstar, Hansol Technics, Hanspree, Heesung, Hipro, Hisense, Hitachi, Holtek, HolyStone, Hon Hai, Honyi Tech, Hoya Group, HP, HPQ, HTC, Huale Optoelectronic, Huan Hsin,

Huawei, Hung Kee Bullion, Hynix, IBM, ICSI, ILITEK, Infotrend, Innolux, Intel, Intel Mobile, Intersil NS, Inventec, IPS-α, I-Sheng, ITE Tech, IVO, Jabil, Jarllytec, Jean, Jetway, Jtouch, Ju Teng, Kenmec, Kindo Optical, Kodak, Kolin, Konica Minolta, Lenovo, Lextar, LG, LG Chemical, LG Innotek, Lite-On, Lotes, LSI, Luminous Optical, Marvell, Matsushita, Maxtor, MediaTek, Micron, Microsoft, Micro-Star, Microtune, MiTAC, Molicel, Moltex, Morningstar, Motorola, MSI, MSI, Murata, MXIC, Nanya, NEC, Nidec Copal, Nikon, Nippon Denko, Nittonh Kogaku, Nokia,

Novatek, NTT DOCOMO, Nvidia, Olympus, OmniVision, Onsemi, Optimax, OptoRite, Orange, Orise Tech, Panasonic, Paragon, PCCB, Pegatron, Pentax, PhaseLink, Phihong, Philips, Phison, Phoenix, Phoenixtec, PixArt, PLD, PMC, Potrans, Promise, ProMOS, Qlogic, Qualcomm, Quanta, Quantum, Raydium, Realtek, Richtek, RIM, Rockchip, Ruizhida, Samsung, Sanritz, Sanyo, Schneider-Kreuznach, Seagate, Semtechl, Sentien, Sharp, Shen Zu Shing, Shuttle, Silicon Works, Simplo, SIS, SK Hynix, Skyworth, Sonix, Sony, Soyo, SpeedTech, Spreadtrum, Sprint, SST, ST-Ericsson, STMicroelectronic, Sun Microsystems, Sunplus, Sunrex, Supermicro, SUPoX, Syncmold, Synnex, Tamron, Tatung, TDK, TE Connectivity, Teac, Tech Data, Telefonica, TI, T-Mobile, Topstar, Toshiba, TPK, TPV, Tripod, Tsann Kuen, TSMC, T-Tech, UMEC, UniBright Chemical, Unika, Unitech, Vanguard, Verizon, Vestel, VIA Technologies, Vizio, Vodafone, Walsin Technology, WD, Weltrend, Wibtek, Winbond, Wintek, Wistron, Xiaomi, Yageo, Yeston, Young Fast, YuFo Electronics, Zhanyun, Zinwell, Zippy, Zotac, ZTE

I would like to order

Product name: Global ICT Industry and Market Report: 2013 Edition

Product link: <https://marketpublishers.com/r/G6165C3B930EN.html>

Price: US\$ 3,800.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/G6165C3B930EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970