China Laptop Industry Report, 2006-2007

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Laptop has grown to be one of the potential hardware products in IT field. Presently, it is able to challenge desktop PC instead of only a complementary to it along with the stronger functions and lower prices. The output of laptop has outnumbered the desktop PC in America and its output growth is also higher than that of desktop PC in the world. The global shipment of laptop reached 58.21 million units in 2005, increased by 18.8% over 2004, but the first half year of 2006 witnessed a typically seasonal decline in laptop market, and its shipment was only 34.7 million units. Whereas, in the second half of 2006, the demands for laptop has experienced a rapid rebound in Europe since September thanks to the growing duo CPU users, and its shipment is expected to reach 72.55 million units during the full year of 2006, up by 24.6% compared to the same period of 2005.

Microsoft has launched a new home operating system Vista in the first quarter of 2007, which reportedly would lead to the next peak of PC replacement. Normally, the PC shipments will not show a remarkable growth in the period when a new system is just launched but in the second half year. Therefore, the peak of PC replacement will not appear in the first quarter but in the second half of 2007 when the shipment of laptop is expected to increase dramatically. It is estimated that the global laptop shipment will reach 89.03 million units in the year of 2007.

The sales market of laptop stands in a monopoly situation, 66% of which is shared by the global top 5 manufacturers, 85% of which is shared by global top 10 manufacturers, and only 15% of which is left for those small manufacturers.

Laptop is mostly produced by OEM manufactories, of which, Taiwan-based manufactories have monopolized the laptop OEM market and they shared 73% of the global laptop output in 2005 and even as high as 90.2% in 2006 when Korean manufacturers like LG, Samsung declared to exit laptop manufacturing business. It is expected that Taiwan-based manufactories will create another record both in laptop shipment and market share in the year of 2007, reaching 81.935 million units and 92% respectively.

Currently, the Taiwan-based OEM companies with largest market share are Quanta, Compal, Wistron, Inventec and Asus, whose laptop shipment account for 85.5% of the total globally.

In 2006, the shipment of Quanta and Compal amounted to 24 million units and 15 million units respectively, and the total market share of them reached 53.8% of the total globally. The shipment of Wistron, Inventec and Asus totaled at 11 million units, 7 million units and 5 million units separately. Some medium-size manufacturers such as MiTAC, FIC, Arima, Uniwill, ECS and Clevo have to struggle for survival in the rest 20% markets.

Although Taiwan-based OEM manufactories have achieved a year-by-year growth in shipment, due to the rather short replacement cycle of IT products, they have to compete for the orders through price war by force of survival, which resulted in the profit margin down to less than 5%. The leading manufacturers can refuse to do the business featured by small quantity and low price, but for most of the medium- and small-size manufacturers, they have to take related measures against the plight, for instance, they provide more diversified hardware for the same model, or combine all the orders from small clients into one large-scale order, and even more, they have to sell the undigested storage to medium and small brands at lower prices.

As the top 2 laptop OEM companies, Quanta and Compal are advantageous in economic scale but also have to seek more orders by cutting down the prices, so the shipment keep growing though, yet the gross margin tends to decline and profit-making ability is limited as well. Instead, the increasingly growing Inventec and Wistron will see a promising future.

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