

China Laptop Industry Report, 2006-2007

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Abstracts

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.

Contents

1. Overview of global laptop market
 - 1.1 Market scale
 - 1.2 Market pattern

2. Overview of Chinese laptop market

3. Overview of laptop industry
 - 3.1 Design and production flow
 - 3.2 Cost structure
 - 3.2.1 CPU
 - 3.2.2 LTD
 - 3.2.3 Mainboard
 - 3.2.4 HDD
 - 3.2.5 Disc drive
 - 3.2.6 Memory
 - 3.2.7 Battery
 - 3.2.8 Software
 - 3.2.9 Cover
 - 3.2.10 Display adapter
 - 3.3 Overview of laptop OEM industry

4. Laptop manufacturers
 - 4.1 Lenovo
 - 4.2 Acer
 - 4.3 Great Wall
 - 4.4 Haier
 - 4.5 TCL
 - 4.6 Amoi
 - 4.7 Compower
 - 4.8 BenQ
 - 4.9 HEDY
 - 4.10 Tsinghua Tongfang
 - 4.11 Thunis
 - 4.12 Hasee
 - 4.13 Xinlan
 - 4.14 FOUNDER

5. Laptop OEM Companies

- 5.1 FIC
- 5.2 MiTAC
- 5.3 Twinhead
- 5.4 Clevo
- 5.5 Uniwill
- 5.6 Arima
- 5.7 Inventec
- 5.8 Wistron
- 5.9 Compal
- 5.10 Quanta
- 5.11 Asus
- 5.12 ECS

6. Metal cover and parts manufacturers of laptop

- 6.1 Huahong (Foxconn Precision)
- 6.2 Catcher
- 6.3 Waffer

7. Plastic cover and parts manufacturers of laptop

- 7.1 Foxconn
- 7.2 Dachang Computer Part (Suzhou) Co., Ltd
- 7.3 Honyi Precision Industry Co., Ltd
- 7.4 Everskill Technology Co., Ltd
- 7.5 Gallant Precision Machining Company Limited

8. Laptop power adapter manufacturers

- 8.1 Lite-On Electronics Inc.
- 8.2 Lishin
- 8.3 Delta Electronic Inc.

9. Laptop CD driver manufacturers

- 9.1 Quanta Storage Inc.
- 9.2 Philips BenQ
- 9.3 TSST
- 9.4 HLDS

10. Laptop display screen manufacturers

- 10.1 AUO

10.2 CMO

10.3 CHUANGHWA

10.4 QDI

10.5 HannStar Display

11. Laptop battery manufacturers

11.1 Simplo Technology

11.2 Dynapack Technologies

11.3 Sanyo Electric

11.4 Sony

11.5 LG CHEM

11.6 Samsung SDI

12. Laptop Keyboard Manufacturers

12.1 Seyen

12.2 Chicony

12.3 Darfon Electronics

12.4 Zippy

13. Laptop PCB manufacturers

13.1 HannStar Board

13.2 Tripod

13.3 Yahsin

13.4 GCE

13.5 COMPEQ

13.6 Unimicron

13.7 Vertex

13.8 Cadac Electronic

14. Laptop radiator manufacturers

14.1 Foxconn

14.2 Yeh-Chiang

14.3 Chaun-Choung

14.4 AVC

14.5 Auras

15. Laptop mainboard chipset manufacturers

15.1 Silicon Integrated Systems Corp

15.2 VIA

Tables/Figures

Global Laptop Shipment, 2002-2006
Contrast and Forecast of Laptop and Desktop PC in Shipment, 2001-2008
Annual Growth of Shipment of Laptop and Desktop PC, 2001Q3-2006Q3
Market Share of Global Top 10 Laptop Manufacturers, 2006Q3
Market Share Trend of Global Top 10 Laptop Manufacturers, 2004Q1-2006Q3
Market Share of Key Laptop Manufacturers in Mainland China, 2006Q3
Shipment Share of Taiwan-based Laptop OEM Factories, 2006
Laptop Shipment Share of Key Taiwan-based Laptop OEM Factories, 2006H1
Operating Results of Lenovo Group, 2000-2006
Operating Revenue of Lenovo Group by Division, 2006
Consolidated Results of Acer, 2002-2006H1
Overall Global PC Shipment of Acer, 2002-2006
Prime Business of Great Wall by Industry, 2006H1
Operating Results of Great Wall, 2002-2006H1
Operating Revenue of BenQ Corporation, 2002-2006Q3
Operating Revenue and Gross Margin of MiTAC, 1999-2006
Shipment Proportion of MiTAC by Customer, 2006
Shipment Proportion of Uniwill by Customer, 2006
Revenue Structure of Wistron by Product, 2004Q1-2006Q3
Shipment Proportion of Wistron by Customer, 2005 & 2006
Revenue Structure of Compal by Product, 2003-2006
Shipment Proportion of Compal by Customer, 2006
Shipment Proportion of Quanta by Customer, 2006
Shipment of OEM Laptop and Self-Brand Laptop of Asus, 2003-2006
Revenue Structure of Asus by Region, 2006
Operating Results Foxconn, 2000-2006H1
Sales Results of Catcher, 2002-2006H1
Operating Results of Waffer, 2000-2006H1
Operating Revenue of Honiyi, Jan-Nov, 2006
Operating Revenue and Gross Margin of Everskill, 2004-2006H1
Sales Proportion of Everskill by Region, 2006
Operating Revenue of Lite-On, 2006Q1-Q3
Operating Revenue of Lihsin, 2005-2006
Operating Revenue and Gross Margin of Lihsin, 2002-2006
Sales Proportion of Delta Electronic, 2006

Operating Revenue of Delta, 2002-2006
Operating Revenue and Gross Margin of Quanta Storage Inc., 2004-2006
Product Structure of HLDS
Sales Results of HLDS, 2001-2006
Change of Operating Revenue and Gross Margin of CMO, 2002-2006Q3
Change of Operating Revenue and Gross Margin of CHUANGHWA
Change of Operating Revenue and Gross Margin of QDI, 2002-2006Q3
Operating Revenue and Gross Margin of HannStar Display, 2004-2006Q3
Product Application Structure Ratio of HannStar Display, 2004-2006Q3
Shipment and Average Sales Price of HannStar Display, 2004-2006Q3
Operating Revenue and Gross Margin of Simplo, 2002-2006
Operating Revenue Results of Dynapack, Oct 2004-Nov 2006
Operating Revenue from Parts of Sony, 2002-2006
Efficiency Boost of Li-ion Battery of Samsung SDI, 2001-2006
Change of Operating Revenue and Gross Margin of Seyen, 2001-2006Q3
Operating Revenue and Gross Margin of Chicony, 2002-2006Q3
Change of Operating Revenue and Gross Margin of Zippy, 2002-2006Q3
Global Market Share of Laptop PCB of HannStar Board, 2002H1-2006H2
Change of Operating Revenue and Gross Margin of Tripod, 2002-2006Q3
Change of Operating Revenue and Gross Margin of Yahsin, 2002-2006Q3
Quarterly Operating Revenue of GCE, 2006
Operating Revenue and Gross Margin of GCE, 2002-2006
Operating Revenue and Gross Margin of COMPEQ, 2000-2006
Operating Revenue and Gross Margin of Unimicron, 2001-2006
Operating Revenue of Cadac Electronic, Aug 2004-Nov 2006
Gross Margin of Cadac Electronic, 2000-2006
Change of Operating Revenue and Gross Margin of Foxconn, 2002-2006Q3
Change of Operating Revenue and Gross Margin of Yeh-Chiang, 2002-2006H1
Change of Operating Revenue and Gross Margin of AVC, 2002-2006H1
Change of Operating Revenue and Gross Margin of Auras, 2002-2006
Operating Revenue of Silicon Integrated Systems Corp, 2002-2006
Operating Revenue and Gross Margin of VIA, 2002-2006
Facilities of 12 Taiwan-based Laptop OEM Factories in Mainland China
Main Products and Clients of 12 Taiwan-based Laptop OEM Factories
OEM Status of Acer, 2005-2006
Operating Revenue and Gross Margin of Inventec, 2001-2006
Operating Revenue and Gross Margin of Compal, 1999-2006
Operating Revenue and Gross Margin of Quanta, 2001-2006
Revenue of Quanta by Product, 2006

OEM Brand and Type of Quanta
Laptop Shipment of Asus in Mainland China, 2004Q1-2006Q3
Main Clients of Foxconn
Main Clients of Catcher
Main Clients of Waffer
Global Clients of Honyi
R & D Expense of Everskill, 2003-2006
Estimated Sales Volume of Everskill by Main Product, 2006
Production Capacity and Actual Output of Everskill by Main Product, 2006
Global Clients for Laptop Business of Delta
Sales of Quanta Storage, 2003-2006
Parts of Products of Philips BenQ
Production Capacity of Hitachi-LG by Facility, 2006
Market Share and Ranking of Hitachi-LG by Product, 2006
Market Share of HLD, 2001-2006
Product Structure of AUO, 2006
Proportion of Operating Revenue of CMO by Product, 2006Q3
Production Capacity of Panel of CMO
List of Laptop Panel Products of CMO
Monthly Operating Revenue and Shipment of CHUANGHWA, Jan-Nov 2006
Shipment Ratio of Laptop Panel of CHUANGHWA, Q1-Q3 2006
List of Laptop Panel Products of CHUANGHWA
Main Clients and Sales Revenue of CHUANGHWA, 2003-2006
Global Facilities of CHUANGHWA
List of Laptop Panel Products of QDI
Production Line Performance of TFT-LCD Panel of HannStar Display
Product Line of Laptop Display Screen of HannStar Display
Market Share of Battery Pack of Simplo, 2003-2006
Shipment of Laptop Battery Pack of Dynapack
Overview of Sony Electronics (Wuxi) Co., Ltd
Proportion of Keyboard to Total Operating Revenue of Chicony, 2004-2006
List of Laptop Keyboard Products of Darfon
List of Laptop Keyboard Products of Zippy
Shipment of Laptop PCB of HannStar Board, 2004Q1-2006Q3
Production Capacity of GCE
Production Capacity of COMPEQ's Four Manufactories
Operating Revenue Proportion of Foxconn by Product, 2004-2006
Operating Revenue Proportion of Yeh-Chiang by Product, 2006

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