

# Global and China Mobile PC Casing (Enclosure) Industry Report, 2012-2013

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## Abstracts

The report covers the followings:

Global and Chinese PC markets

Global and China Mobile PC industry

Notebook and tablet PC casing industry

5 leading notebook and tablet PC OEMs

18 notebook and tablet PC casing manufacturers

In 2012, it becomes the most conspicuous trend of notebook casing that the surfaces A, B, C and D employ different materials. The main reason lies in the popularity of Apple Unibody aluminum alloy casing; consequently, other peers follow up Apple's aluminum alloy casing so as to maintain their market share. Yet, it takes a long time and considerable capacity to produce Unibody aluminum alloy casing. The capacity of Unibody aluminum alloy casing giants Foxconn and Catcher has been fully occupied by Apple.

The emergence of Ultrabook has also driven the change of materials for notebook casing. Ultrabook's A-side is very thin and has touch screen function, so it requires high strength; what's more, A side determines the outer appearance to the maximum extent. In accordance with the cost of A side, the most expensive material comes to carbon fiber textile reinforce or magnesium alloy die casting, followed by aluminum stamping.

However, the appearance of carbon fiber is not flexible enough; and the strength of CFRP remains nearly the same as that of magnesium alloy.

B side is usually linked with A side, made of plastic.

The cost of C side is the highest. C side not only accommodates the keyboard, but also supports various structural parts. Therefore, C side should have the highest strength. Due to complex shape and time-consuming processing, C side is more expensive than A side. The cost of Apple's Unibody aluminum alloy CNC ranks first, and magnesium alloy casting ranks second.

D side also plays an exceedingly important role in the Ultrabook field. Being ultra thin, the heat dissipation problem of Ultrabook should be paid attention to. Ultrabook uses flat LiPolymer battery, which requires a sufficiently high strength. In accordance with the cost of D side, the most expensive material is carbon fiber textile reinforce or magnesium alloy die casting, followed by aluminum stamping, then glass fiber reinforce, and the worst is plastic.

For medium and high-end notebooks, A side is made of aluminum alloy stamping, B side plastic, C side magnesium alloy die casting, and D side glass fiber reinforced plastic or aluminum alloy stamping. Low-end ones still adopt plastic casing. High-end ones utilize CFRP or magnesium alloy die casting for A side, plastic for B side, Unibody for C side, and carbon fiber woven cloth reinforce or magnesium alloy stamping for D side. Medium-end ones also probably make use of glass fiber reinforced plastic casing.

The notebook casing industry scale soared by 11.1% to USD5,620 million in 2012, and it is expected to grow by 10.9% to USD6,130 million in 2013. The notebook output is on the decline, but the notebook casing market size still maintains the growth rate of about 10% due to the wide application of metal casing. In 2012, the tablet PC enclosure industry generated USD2,096 million, rising 49.5% from a year earlier; and the value is expected to ascend by 33.7% to USD2,803 million in 2013.

The casing of iPad2 costs about USD25. Because the thickness of iPad mini casing becomes as thin as 7.2mm, the casing process of iPad mini is more complicated than that of New iPad, and the surface treatment of iPad mini is also more difficult. As a result, it takes more time to process iPad mini casing with the unit price as high as USD20.

Samsung employs iPhone-like design, and it applies glass to front panels and plastic to

the rest parts. Google Nexus 7 casing is completely made of plastic, which lowers the cost to USD10 or so, and the casing is supplied by Quanta's Zhanyun. Amazon's first generation Kindle is equipped with plastic casing with the cost of USD10, while the second generation one with aluminum alloy stamping backplane with the cost of about USD14. The first generation Kindle casing is provided by Zhanyun, whereas the second generation casing is offered by Ju Teng.

Foxconn Technology, Catcher and CASETEK sweep all casing orders for all Apple's products, so their performance witnesses steady growth, and they are admired. The plastic casing giant Ju Teng improved the metal casing business substantially in 2012, so that its revenue and profit were raised significantly.

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