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Global and China Electronic Paper Industry Report, 2009

Sep/2009
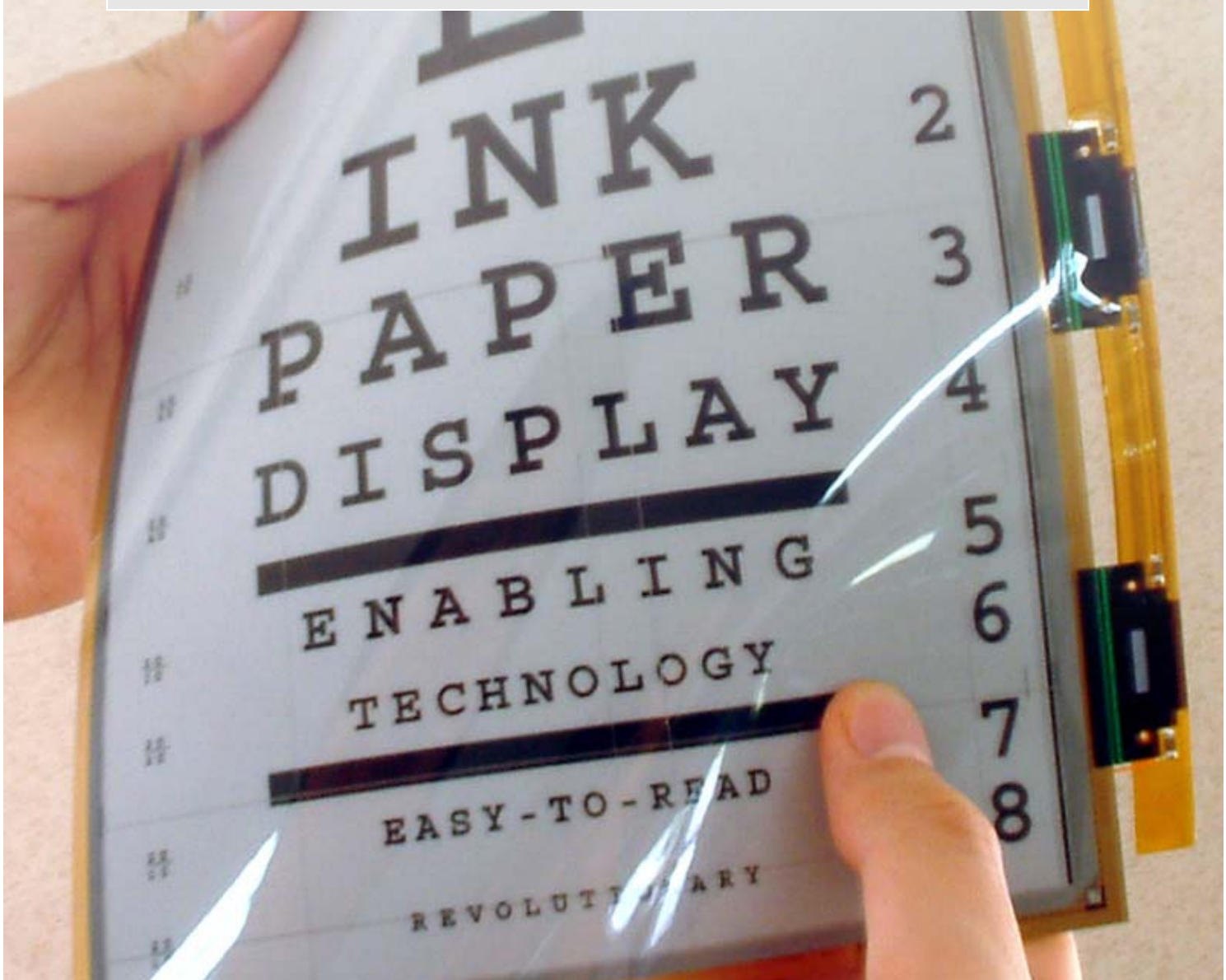
2. E-paper Industry and Market

2.1 Industry Chain

Existing E-Ink electronic paper industry chain consists of three parts: FPL (FrontPlane Laminate), display module and system manufacturers. The detailed process includes Electronic Ink manufacture, FPL manufacture, display cell assembly, display module assembly, and system integration.

Among FPL manufacture, except E-ink film, there are also plastic film, ITO, adhesive and release sheet. The cell assembly includes sticking FPL on the TFT's backplane.

Profile of E-INK E-paper Display Unit
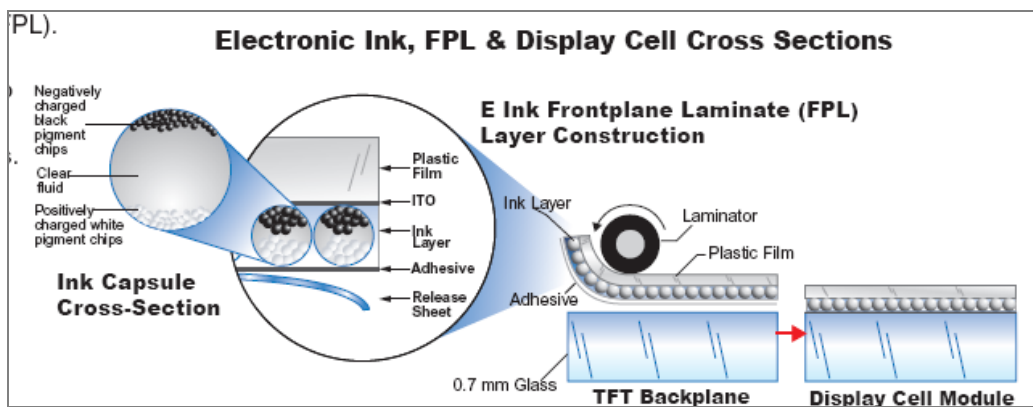
3. Main E-paper Application Fields and Market Research

According to the data of Yano Research Institute Ltd, Japanese e-book shipment would reach 130 million pieces in fiscal year 2006 (from April of 2006 to March of 2007), 2.74 times the figure in previous fiscal year. The market scale approximated JPY20 billion in 2008 and will rise to JPY57.2 billion in 2010. iSuppli also predicts that the sales revenue of flexible display panel including e-paper will increase to $340 million in 2013 from $5 million in 2006, with annual growth rate of 83.5% on average.

E-paper Module Market Size, 2008-2014

	2008	2009	2010	2011	2012	2013	2014
Market Scale ($m)	**	**	**	**	**	**	**

Global E-paper Market Downstream Applications, 2008-2014

Figure omitted⋯⋯

E-INK E-paper Industry Chain
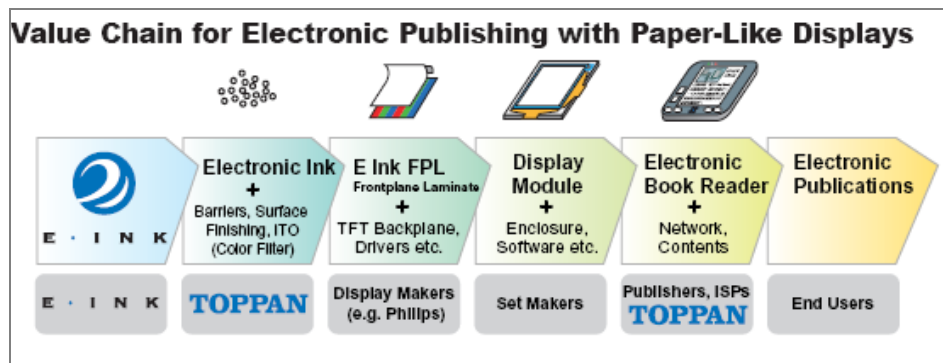
3.2.3 China E-book Market

Chinese market is highly sensitive to prices. Unless retail price can be down to about RMB200, E-book will not be favored in Chinese market in next a few years. Even the selling price of RMB800 to RMB1,000 will not be

accepted by Chinese consumers since e-book reader is inferior in price-performance ration compared with MP3, PMP, PDA and Notebook. Chinese market boasts of huge potentials and many people want to have e-book reader, but the price is the bottleneck. Judging from current development trend, the price of about RMB200 can be attained in 2015.

E-book Reader Shipment in Greater China, 2008-2014

	2008	2009	2010	2011	2012	2013	2014
Shipment (1,000 units)	**	**	**	**	**	**	**

3.2.9 Tianjin Jinke

Tianjin Jinke was founded in 1985, and is a high-tech enterprise set up by Nankai University and Hong Kong Pangjin Group jointly, with the registered capital of RMB31 million. The company is located in New Technology Industrial Park in Tianjin, employing nearly 200 people, 95% of whom have undergraduate education and 20 % have master's degree or doctorate.

The company is engaged in electronic information industry, "e-book" and other mobile information platforms, terminals and a variety of application software research and development. It is the first national software base backbone enterprise which was awarded with ISO9001 quality system certification, and also the leading company in e-books reader production.

Hanlin eReader V5

★Do not flicker, adopt the global latest E-Ink display technology ★ High-resolution, high contrast ★ Light weight, close to the weight of a real book★ Support multiple file formats and the majority of electronic documents (PDF, DOC, etc.)......

¥ Retail Price: ￥1980

 Hanlin eReader V3

Hanlin eReader V3 will make you feel relaxed, efficient and interesting in your work, study and daily life!

★ Do not flicker, similar to black and white display

¥ Retail Price: ￥2980

 Hanlin eReader V2

V2 eBook Reader supports PDF / DOC / RAR and other 10 kinds of popular formats. It enables users to read the text directly. It has the function of automatic speech recognition play. All the books are showed as original layouts. Large black and white screen.

 Retail Price: ￥3480

Copartners:

Digital Newspaper

Digital Newspaper Lab

🍃 Industrial Copartners

🍃 Digital Publishing

🍃 International Cooperation

Two OEM Products

A:

Application

Target Customers: Publishing houses, libraries, educational institutions, public institutions and newspaper, etc.

Minimum Order Quantity: no

NRE Fee: depend on workload

Size: 186mm (length)*118mm (width)*8mm (height)

Weight: 200g (with battery)

Screen: E-paper display (Eink technology); 6 inches; resolution: 800 * 600 (pixels); gray 4

Sound: 3.5 mm headphone jack

Keyboard: Power, up and down keys, left and right keys, page up, page on, confirm, cancel, menu, music

Battery: Customer-defined Default: Rechargeable lithium battery

Processor: Customer-defined Default: ARM 200MHz

ROM MEMORY: Customer-defined Default: 64 MB-1GB Data Flash

RAM MEMORY: Customer-defined Default: 32 MB

Connection: Customer-defined Default: USB (v2.0)

Extended Memory: Customer-defined Default: SD slot

Touch Screen: Customer-defined Default: no

Communications: Customer-defined: WiFi/CDMA/GPRS/Bluetooth Default: no

Cover: Customer-defined

Power: Universal AC 100~240V, DC 5V 1A

Color: Customer-defined Default: White

Operating System: Customer-defined (Default: Linux)

Supported Formats: PDF, DOC, WOLF, HTML, JPG, TXT, CHM, RAR, ZIP, XEB, CEB, Images ETC

Accessories: Customer-defined Default: E-book reader, USB cable, charger, user manual

 B:

Application

Target Customers: Publishing houses, libraries, educational institutions, public institutions and newspaper, etc.

Minimum Order Quantity: 2000 set per year

NRE Fee: no

Specifications

Size: 194mm (length) x133.6mm (width) x13.4 mm (height)

Weight: 280g (with battery)

Screen: Main Screen: E-paper display (Eink technology); 6 inches; resolution: 800 * 600 (pixels); gray 4

Sub-screen: STNScreen; Resolution: 254 * 96 (pixels); Touch Screen

Touch Screen: Only sub-screen

Sound: 3.5mm headphone jack

Keyboard: Zoom, directory, rotation, setting, selection, flip, touch pen

Battery: Default: Rechargeable lithium battery

Processor: Customer-defined Default: EPson 40MHZ

ROM MEMORY: Customer-defined Default: 16 MB Data Flash

RAM MEMORY: Customer-defined Default: 1 MB

Connection: Customer-defined Default: USB v1.1

Extended Memory: Customer-defined Default: SD slot

Power: Universal AC 100~240V, DC 5V 1A

Color: Customer-defined Default: White

Operating System: Customer-defined (Default: Wolf OS)

Supported Formats: WOL, TXT, HTML, MP3, XEB

Accessories: Customer-defined Default: E-book reader, USB cable, charger, user manual

Financial Data of Tianjin Jinke, 2007

Employees	Operating Revenue	Assets	Including: Export Delivery Value	Main Business Cost	Operating Cost	Management Cost	Ad Cost	Industrial Intermediate Input	Including: Direct Materials
**	**	**	**	**	**	**	**	**	**

RMB: 1000

Contact

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