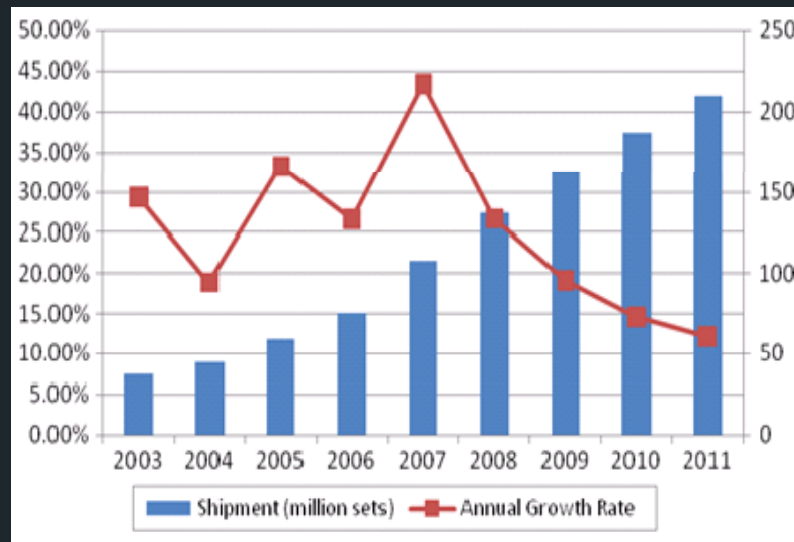


Global and China Notebook PC Industry Report, 2009



The substantial drop in laptop price stimulates the market even during global economic downturn, and the debut of netbook facilitates the sale. In emerging countries, there is still large development room for laptops.

Laptop Shipment and Growth Rate, 2003-2011



Manufacturers in Laptop Industry Chain

	1 st Tier	2 nd Tier	3 rd Tier	Others
Laptop OEMs	Quanta	Compal	Wistron	Inventec, Hon Hai, Pegatron & CLEVO
CPU Manufacturer	Intel	AMD		
CD-ROM Manufacturers	TSST	HLDS	LITEON	Quanta Storage Inc, Panasonic, Sony NEC
Hard Disk	Western Digital	Seagate	HGST	Toshiba & Samsung
Screen	Samsung	LG Display	AUO	CMO (Innolux), Hannstar, BOE, TMD
Case	Ju Teng	Hon Hai	Huan Hsin	Zhanyun Electronics, Catcher
Heat Radiation	Foxconn Precision	AVC	CCI	Auras
Battery	Simple	Ganyo	Sony	LG Chemical, Samsung SDI, Celxpert & Dynapack

Global Main Laptop OEMs Shipment and Clients, 2009

Unit: 1,000 units

	Shipment, 2009	The Largest Client	The 2 nd Largest client	The 3 rd Largest client
Quanta	35,900	HP	DELL	Acer
Compal	37,900	Acer	HP	DELL
Wistron	25,600	Acer	DELL	HP
Inventec	21,600	Toshiba	HP	DELL
Pegatron	10,900	ASUS	Apple	Sony
Elitegroup	3,600	Lenovo	Hasee	Founder
Hon Hai	7,200	ASUS	Apple	Sony
CLEVO	1,600	Hasee	Founder	

The followings should be concerned in laptop field in 2010

- Touch screen: it is expected that the penetration rate will reach 5.3% mainly promoted by Apple Tablet PC and Win7
- 3D Display: the first-class laptops all have employed 3D display, and it is forecasted to be 0.8% in 2010
- Blue-ray DVD Drive: it is expected to reach 2.5% in 2010 since its big fall in price
- Shortage in Drive: the upstream manufacturers have not expanded their output in recent years due to uncertain prospect of drive industry, while the demand has increasingly grown
- Shortage in Hard Disk: similar to drive industry, the manufacturers have not enlarged output because of the threat from SSD, while the demand has continuously increased

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