Global and China Notebook PC Industry Report, 2010

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This report

- **Analyzes the status quo and development of the global and China's Notebook PC Industry .**
- **Focuses on the market segments of Notebook PC , such as Notebook CPU, Notebook OEMs , WLAN Wireless Module, Notebook Cell, Notebook PC Display and so on.**
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Abstract

In 2009 when netbook was massively rolled out into the market, the sales volume of notebook computer worldwide witnessed rapid growth despite the weak economies, and it was stimulated by the global economic recovery in 2010, but geared down in respect that netbook was severely beaten by tablet computer.

As the stimulation effect of economic resurgence fades away and there is stronger impact from tablet computer in 2011, the sales volume of global notebook computer is predicted to experience a sharp decline in growth margin in 2011 against 2010. The shipment of iPad approximated 14.79 million in 2010, and it is estimated to reach 37.60 million in 2011, a substantial growth of 1.54 folds from the previous year.

The success of iPad lies in that its app store itune provide over 300 thousand kinds of application programs, and meanwhile, Apple develops such services as e-books and online videos & audios through the cooperation with newspapers and media so that iPad has triumphantly attracted the consumers.

In January 2011, nearly one hundred types of tablet computers were showcased on CES; however, the tablet computer that has market positioning distinguished from iPad can be the winners of the tablet market. As for other online shops like Android Market, it is still difficult to find one that can compete with Apple's itune.

So, over 80% tablet computer market this year will still be dominated by Apple iPad. Promisingly, the shipment of non-iPad tablet computers in 2011 will reach around 7 million, accounting for roughly 16% of the total tablet PC shipment. The rise of tablet computers has significantly seized the market shares from netbook whose sales dramatically shrank from 32.80 million in 2009 to 26.20 million in 2010 and will fall further in the future.

Abstract

Supply Relationship between Global Notebook Brand Vendors and OEMs and Shipment, 2010

(Unit: 10K)

	Quanta	Compal	Wistron	Inventec	Hon Hai	Flextronics	Pegatron	Other	
HP	2400	200	200	300	200	430			4030
ACER	500	1800	850				200		3350
DELL	400	1100	1000		300		200		3000
LENOVO	600	700	700	150					2150
TOSHIBA	460	800		1155					2415
ASUS					400		845		1245
APPLE	550				100		300		1050
OTHERS	300	210						1000	1510
	5210	4810	2750	1615	1000	430	1545	1000	18760

Source: ResearchInChina

Over 95% notebook computers worldwide are made by Taiwanese OEMs. Quanta powerfully regained the No.1 position from Compal in 2010 since Acer, the largest client of Compal, performed poorly in quarter 4 with grave inventory. Wistron also failed to meet the shipment objective in 2010, because its parent company –Acer delivered more orders to Compal. With the focus on quality instead of quantity, Inventec invariably hovered at the low level and rejected the low-price orders of HP.

Hon Hai took on the explosive momentum due to the fact that it was willing to accept the ultra low price offered by HP and ASUS deliberately reduced the reliance on Pegatron. Flextronics head-hunted all around in order to make certain breakthroughs in notebook OEM, nevertheless, in view of the experience, Flextronics could only resort to low price, so HP naturally became its exclusive client. The separation between Pegatron and ASUS would bring the shrinking orders from ASUS.

Notebook computer OEM field is characterized by fierce competition and the gross margin of the OEMs is usually between 3%-5%. Consequently, the OEMs are trying hard to reduce the notebook OEM proportion so as to raise the gross margin; while EMS companies, especially Hon Hai and Flextronics, are doing their utmost to enhance the ratio of notebook OEM business which is the only field where they can achieve the substantial increase in their operating income. Moreover, EMS companies would like to accept despite the low gross margin merely for the sake of the experience in notebook OEM; while the traditional notebook OEMs dare to refuse the low price.

HP is cleverest at profiting from the competition among notebook OEMs. Nowadays, none but Flextronics and Hon Hai care for the orders of HP, and Quanta only takes the high-end notebook computer orders of HP.

It seems a tidal wave of westward march of the notebook computer industry is staged since HP moved its manufacturing plant to Chongqing. However, the shipment still relies on the delivery to such seaport cities as Shanghai and Shenzhen, and the slightly lower labor cost in the west than that in the east cannot make up the logistics cost caused by the longer-distance transportation. As a result, Yangtze River Delta remains the logistics base of 80% notebooks worldwide, and Chongqing is simply a standby for the moment.

As for the supply of notebook computer components, the majority of components except memory, CPU, panel, and HDD can be independently produced by Taiwan manufacturers with increasingly high self-sufficiency rate.

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