



# Global and China Tablet PC Industry Chain Report, 2010-2011

July 2011

## ***This report***

- ◆ **Provides market shares of leading Tablet PC Processor Manufacturers.**
- ◆ **Focuses on operation of major tablet PC Manufacturers.**

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Global and China Touch Panel Industry Report, 2010-2011

Global and China Mobile Phone and Tablet PC Processor Industry Report, 2010-2011

## Abstract

An overwhelming majority of tablet PC can be regarded as large-version smart phones with the hardware structure very similar to the smart phone. The tablet PC not only grabs the market space of netbook, but also muscles in low-end notebook market. However, tablet PC lags far behind high-and medium-end notebook in terms of performance, especially when it comes to document processing and gaming. In reality, table PC takes no consideration of large-scale gaming and document processing in design.

The tablet PC is composed of four categories of components, namely, active component, passive component, functional component and structural component.

The passive components mainly include resistance, inductance, capacitance and crystal oscillator which are 100% SMDs, namely, CHIP-R, CHIP-L and MLCC. Among these, MLCC occupies a lion's share of the cost, which is usually provided by Murata, TDK, Yageo and SEMCO.

The functional components comprise of LCD Panel, Touch Panel, battery and camera. It is often believed that Touch Panel is the most expensive, but it is not true. The fact is that LCD Panel and Touch Panel are laminated together and cannot be put into use separately. TPK and Wintek also ship products in this way, so the prices of their products are relatively high. The LCD Panel of iPad 2 is priced at roughly USD35 while the Touch Panel amounts to USD50-55, approximately. It can be seen that Touch Panel is expected to cut down on cost substantially.

The structural components consist of case, structure and PCB. Only a few manufacturers worldwide have the ability to produce light and thin tablet PC cases, including Foxconntech and Catcher, which meet the requirement of possessing over 8,000 sets of CNC machine tools, with huge investment and an entry threshold higher than that of GPU.

The biggest beneficiaries from the tablet PC market are touch screen manufacturers such as TPK which saw multiplied growth in revenue and profit, followed by RAM manufacturers such as Elpida specializing in the production of Mobile DDR DRAM. The tablet PC requires large capacity of Mobile DDR DRAM, generally 2GB, while mobile phone generally adopts 512MB-1GB.

Another big winner in the tablet PC market comes to NAND makers. SSD has long been trying to supersede the hard disk drive of notebook, but hard disk drive has conspicuous advantages even in the field of netbook. Generally speaking, all the tablet PCs employ SSD, resulting in soaring Toshiba and Samsung shipments. In FY2011, NAND became the most lucrative business of Toshiba which realized the operating profit of USD1.239 billion, roughly, among which, at least USD200 million was brought by iPad business.

Moreover, FPCB manufacturers also benefit from the market. FPCB products are also applied at circuit connection parts and in touch screen of tablet PC. Each tablet PC needs FPCB valuing around USD15-20, much higher than that applied in the smart phone (USD10-15). In particular, Mektron and FLEXIUM are the largest gainers. For example, the operating profit of Mektron Manufacturing Corporation (Zhuhai) Ltd., a China-based subsidiary of Mektron, increased 16.5 folds in 2010.

In the case filed, Catcher, a favorite of iPad Like manufacturers, is expected to increase its revenue by 55% in 2011.

However, being a partner of iPad2 doesn't necessarily mean success. Simplo offers 60% of iPad2 batteries, but it needs to purchase CELL from Samsung SDI, LG Chem and Sanyo. The gross margin of iPad2 battery is lower than that of traditional notebook batteries, causing the decline in gross margin of Simplo in 2011.

Apple achieved very low cost of raw materials by means of huge procurement. Most iPad Like manufacturers including HP, Dell, RIM and Lenovo outsource the tablet PC business to Taiwan-based ODMs, with the tablet PC design and supply chain management included. These ODM manufacturers all specialize in the notebook OEM business and aren't resourceful in the field of tablet PC. In this sense, iPad Like manufacturers are likely to suffer losses even if their products' prices are USD150/set higher than that of the iPad2.

Unlike its equivalents, HTC dips its toes in all the links of tablet PC industry, but the shipment is small and the prices are high. Additionally, Samsung possesses powerful vertical industry chain resource, and can offer key raw materials of tablet PC, including LCD Panel, GPU, MEMORY, MLCC, etc. Therefore, Samsung is the only manufacturer that can compete with Apple.

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