



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

**Jan. 2013**

## STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## INFORMATION SOURCES

The primary information sources include China Customs, Company Reports, China Customs, and National Bureau of Statistics of China etc.

## Abstract

### The report covers the followings:

1. Global and Chinese PC markets
2. Global and China Mobile PC industry
3. Notebook and tablet PC casing industry
4. 5 leading notebook and tablet PC OEMs
5. 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.

Copyright 2012ResearchInChina

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.

### **1 Global PC Market**

- 1.1 Global PC Market Size
- 1.2 Notebook Market
- 1.3 Chinese Notebook Market
- 1.4 Ultrabook Market
- 1.5 Tablet PC Market

### **2 Mobile PC Industry**

- 2.1 Notebook Industry
- 2.2 Notebook ODM
- 2.3 Tablet PC Industry
- 2.4 China Mobile PC Industry

### **3 Notebook and Tablet PC Casing & Internal Components Industry**

- 3.1 Brief Introduction to Glass Fiber Casing
- 3.2 Metal Casing and Internal Components
- 3.3 Carbon Fiber Casing
- 3.4 Contrast between Various Notebook Casing Materials
- 3.5 Development Trends of Notebook Casing
- 3.6 Mobile PC Casing Industry Scale
- 3.7 Ranking in Mobile PC Casing Industry

### **4 Mobile PC OEMs**

- 4.1 Quanta
- 4.2 Compal
- 4.3 Wistron

4.4 Inventec Inventec

4.5 Pegatron

### **5 Mobile PC Casing Manufacturers**

5.1 Ju Teng

5.2 Huan Hsin

5.3 Catcher

5.4 Waffer

5.5 Shengmei

5.6 Zhanyun

5.7 Casetek

5.8 Chia Chang

4.9 Dragon Tech Precision

5.10 Sentien

5.11 Pttech

5.12 Foxconn

5.13 Kangzhun Electronic Technology

5.14 Chunqiu Technology

5.15 Mobase

5.16 Intops

5.17 Hamagawa

5.18 Getac

- Global PC Shipment, 2007-2013
- Global DT Shipment, 2007-2013
- Market Share of Global Top Five PC Vendors, Q3 2011-Q3 2012
- Global Shipment of Notebooks, 2007-2013
- China's Shipment of Notebooks, 2003-2012
- Market Share of Major Notebook Vendors in China, 2009-2012
- Ultrabook Market Size, 2011-2016
- Tablet PC Shipment, 2010-2016
- Market Share of Major Tablet PC Vendors, 2011-2013
- Shipment of Major Notebook Brands, 2010-2013
- Market Share of Major Notebook OEMs, 2006 vs 2008
- Relationship between Global Notebook Brand Vendors and OEMs and Shipment Ratio, 2010
- Relationship between Global Notebook Brand Vendors and OEMs and Shipment Ratio, 2011
- Relationship between Global Notebook Brand Vendors and OEMs and Shipment Ratio, 2012-2013
- Output of Major Tablet PC Vendors, 2012-2013
- China's Laptop Computer Output (including Tablet PC), 2004-2012
- China's Laptop Computer Output (including Tablet PC) by Region, 2010-2012
- Notebook Casing Industry Scale, 2009-2015
- Notebook Shipment by Casing Material, 2011-2015
- Tablet PC Casing and Internal Components Industry Scale, 2011-2016
- Ranking of Major Mobile PC Casing Manufacturers by Revenue, 2011-2012
- Market Share of Major Notebook Casing Manufacturers, 2012
- Market Share of Major Tablet PC Casing Manufacturers, 2012
- Quanta's Revenue and Gross Margin, 2001-2012
- Quanta's Revenue and Growth Rate, Jan. 2011-Dec. 2012
- Quanta's Notebook Shipment and Growth Rate. 2004-2012

- Quanta's Revenue by Region, 2008-2011
- Quanta's Revenue by Product, 2007-2012
- Quanta's Revenue by Client, 2007-2011
- Compal's Global Presence
- Compal's Revenue and Gross Margin, 2003-2012
- Compal's Monthly Revenue and YoY Growth Rate, Jan. 2011-Dec. 2012
- Compal's Notebook Shipment and Growth Rate, 2007-2012
- Compal's Revenue by Client, 2007-2012
- Output of Compal China, 2009-2011
- Revenue and Gross Margin of Wistron, 2003-2012
- Notebook Shipment and Growth Rate of Wistron, 2004-2012
- Revenue Structure of Wistron by Product, 2005-2012
- Notebook Shipment of Wistron China, 2009-2011
- Inventec's Organizational Structure
- Inventec's Revenue and Gross Margin, 2003-2012
- Inventec's Monthly Revenue, Jan. 2011-Nov. 2012
- Pegatron's Organizational Structure
- Pegatron's Revenue and Operating Margin, 2008-2013
- Pegatron's Revenue by Product, 2011-2013
- Revenue and EBIT of Ju Teng, 2004-2012
- Revenue and Gross Margin of Ju Teng, 2006-2012
- Organizational Structure of Ju Teng
- Client Distribution of Ju Teng, 2009-2012
- Revenue and Pre-Tax Profit of Huan Hsin, 2003-2012
- Revenue of Huan Hsin by Product, 2009-2012
- Catcher's Revenue and Operating Margin, 2004-2012

- Catcher's Monthly Revenue, Jan. 2011-Dec. 2012
- Catcher's Revenue by Client, 2011-2012
- Catcher's Revenue by Application, 2010-2013
- Financial Performance of Catcher's Subsidiaries in Mainland China, 2010-2011
- Waffer's Revenue and Gross Margin, 2003-2012
- Casetek's Organizational Structure
- Casetek's Revenue and Gross Margin, 2009-2013
- Casetek's Revenue and Operating Margin, 2009-2013
- Casetek's Revenue by Application, 2009-2012
- Revenue and Operating Margin of Chia Chang, 2008-2012
- Monthly Revenue of Chia Chang, Jan. 2011-Dec. 2012
- Revenue of Chia Chang by Application, Q3 2010-Q2 2011
- Shipment of Chia Chang by Application, Q3 2010-Q2 2011
- Revenue of Chia Chang by Product, Q3 2010-Q2 2011
- Shipment of Chia Chang by Product, Q3 2010-Q2 2011
- Revenue and Operating Margin of Sentien, 2007-2012
- Monthly Revenue of Sentien, Jan. 2011-Dec. 2012
- Revenue and Operating Margin of Pttech, 2006-2012
- Monthly Revenue of Pttech, Jan. 2011-Dec. 2012
- Revenue and Operating Margin of Foxconn, 2004-2012
- Monthly Revenue of Foxconn, Jan. 2011-Dec. 2012
- Revenue and Operating Profit of Foxconn's Subsidiaries in Mainland China, 2008-2011
- Revenue and Operating Profit of Mobase, 2007-2013
- Revenue and Operating Margin of INTOPS, 2004-2013
- Revenue and Gross Margin of Hamagawa, 2008-2013
- Monthly Revenue of Hamagawa, Jan. 2011-Dec. 2012



- Revenue and Gross Margin of Getac, 2007-2013
- Monthly Revenue of Getac, Jan. 2011-Dec. 2012
- Revenue of Getac by Business, 2011-2012

**You can place your order in the following alternative ways:**

1. Order online at [www.researchinchina.com](http://www.researchinchina.com)
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: [report@researchinchina.com](mailto:report@researchinchina.com)
4. Phone us at +86 10 82600828/ 82601561

<b>Party A:</b>			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

<b>Party B:</b>			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
<i>Total</i>		

**Choose type of format**

- PDF (Single user license) .....2,100 USD
- Hard copy ..... 2,200 USD
- PDF (Enterprisewide license)..... 3,300 USD

**※ Reports will be dispatched immediately once full payment has been received.**  
**Payment may be made by wire transfer or credit card via PayPal.**