

Quanta #1 Notebook PC OEM Maker in Q1'08; HP #1 Notebook PC LCD Panel Customer of Samsung, LGD and AUO

AUSTIN, TEXAS, June 26, 2008—DisplaySearch, the worldwide leader in display market research, has released its Q1'08 *Quarterly Notebook PC Value Chain Report*, which shows the detailed relationships between notebook PC LCD panel makers, notebook PC brands and notebook PC OEMs (Original Equipment Manufacturers). LCD panels are consigned by notebook PC brands and then shipped to the notebook PC OEMs for assembly. In Q1'08, Quanta was the top notebook PC OEM maker, and HP was the top notebook LCD panel customer of Samsung, LGD and AUO.

In Q1'08, 32.9 million notebook PC LCD modules were shipped from TFT LCD panel makers, while notebook PC manufacturers shipped 31.1 million units. These variances were mainly due to supply chain, assembly lead time, buffer stocks and channel inventory.

Japan-based notebook PC brands like Lenovo, NEC, Toshiba, Sony and Fujitsu still maintained some in-house notebook PC assembly, and their in-house ratio was approximately 14.5% in Q1'08.

Among Taiwanese notebook PC OEMs, Quanta was the leading manufacturer with a 31% market share on a unit basis, followed by Compal at 24%, and Wistron with 16% share, as shown in Table 1.

The main customers for Quanta, in order of descending volume, were HP, Dell, Apple, Acer and Lenovo. The main customers for Compal were HP, Dell, Acer and Toshiba. The main customers of Inventec were HP and Toshiba. HP, Acer and Dell were the main customers of Wistron. The main OEM customers of Pegatron were ASUS and Toshiba in Q1'08.

Table 1: Top Five Notebook PC OEM Manufacturers by Share

Rank	Notebook PC OEM Manufacturers	Q1'08 Share	Major Customers
1	Quanta	31%	HP, Dell, Apple, Acer, Lenovo
2	Compal	24%	HP, Dell, Acer, Toshiba, Lenovo
3	Wistron	16%	Acer, Dell, HP, Lenovo, FSC
4	Inventec	11%	HP, Toshiba, FSC, Acer
5	Pegatron	8%	ASUS, Toshiba, Dell
	Others	9%	
	Total	100%	

The top seven notebook PC module suppliers are listed in Table 2, along with their top customers by volume. In Q1'08, HP was the top customer of LGD, Samsung and AUO. Sony, FSC and Dell were the major notebook PC LCD customers of CPT. In addition, each of the top five suppliers looked to their top five customers for at least 60% of their volume.

Table 2: Top Customers' Share of Notebook PC LCD Panel Makers' Shipments in Q1'08 (Unit Basis)

Rank	LCD Panel Makers	Top Five Customers	Top Customers' Unit Share
1	LG Display	HP, Dell, Acer, Toshiba, Apple	74%
2	Samsung	HP, Dell, Acer, Toshiba, Lenovo	75%
3	AUO	HP, Acer, Dell, ASUS, Lenovo	78%
4	CMO	Acer, HP, ASUS, Dell, Fujitsu & Fujitsu-Siemens	61%
5	CPT	Sony, Fujitsu & Fujitsu-Siemens, Dell, ECS, Samsung	78%

According to Brian Chen, research director at DisplaySearch and the author of the *Quarterly Notebook PC Value Chain Report*, "DisplaySearch's in-depth Quarterly Notebook PC Value Chain Report has quickly become an indispensable research tool for the TFT LCD industry. It's a comprehensive reference on the supply chain relationships between notebook PC module makers, notebook PC OEM manufacturers and notebook PC brands."

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