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Computer Terminals



June 2010 US\$495



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COMPUTER TERMINALS

Supplier capability in China

EXECUTIVE SUMMARY

China's computer terminals industry is strengthening its position in the global market, riding on the mobile connectivity and features integration trends to boost competitiveness further. Suppliers are confident of sustained growth, especially in the portable segment. Output of laptops, which dominate the line, is expected to hit 155 million units this year. The country remains the largest manufacturing hub worldwide in this category, turning out nearly 80 percent of the total.

Makers are underscoring multifunctionality and value-added features in compact form factors. This is in line with efforts to grow the portable sector. Some companies are looking to explore the tablet subcategory following the successful launch of the iPad.

Ultra-mobile PC suppliers are also counting on the strong market penetration of Apple's new device to drive interest in mini laptops. They forecast global output will grow 15 percent this year from 2009.

Although netbooks face a downward trend in coming months due to intense competition, sales are forecast to hit 3 million units by end-2010, still up from 1.9 million in 2009.

At the same time, makers are strengthening the traditional desktop segment by emphasizing its performance-to-price ratio advantage and introducing more compact units.

For auxiliary products such as expansion cards, China enterprises offer sound, IEEE 1394, satellite TV tuner, smart TV, PCI-based sound, SATA PCI, PCI Express, PCI WLAN 802.11n and USB 3.0 Express types.

The following are some of the key trends in China's computer terminals industry:

- Prices climbed in recent months in response to an upturn in material and component costs. Manufacturers,

however, kept adjustments minimal to remain competitive in an intensifying price war.

- R&D projects are centered on connectivity upgrades and energy efficiency. The former addresses widening wireless Internet, Bluetooth and 3G adoption, while energy-saving designs support expanding product capability and environment-friendly trends.

- While China companies continue to emphasize OEM and ODM projects, a growing number are exporting their own brands and toward this end are building up overseas channels. The cost of providing aftersales support, however, remains a challenge for such enterprises so they work with partners in destination countries or use the retail distribution market.

- Under efforts to boost export sales by at least 10 percent, makers are improving operating efficiency, broadening product selections, shortening development turnaround time and decreasing defect rates.

This report covers desktop computers, laptops, netbooks and UMPCs manufactured in China. Each product is discussed in a separate module, which details common features found in mainstream models. Price and R&D trends are also included.

The Industry Overview discusses developments in this line in China, including growth opportunities in coming months. It identifies the factors shaping the segment.

The majority of China suppliers are based in Guangdong province, and the rest spread over Beijing, and Jiangsu and Fujian provinces.

Shenzhen and Dongguan cities in the first are becoming key hubs for netbooks and UMPCs, while there is a production buildup in Xiamen in Fujian and the inland Chongqing municipality.

In this report

- 17 in-depth company profiles
- 24 additional suppliers
- 69 top-selling export products
- Supplier demographics
- Supplier survey
- Industry statistics & charts

METHODOLOGY

To produce this report, Global Sources surveyed a wide range of suppliers. Rather than focus simply on high-profile makers, we compiled a representative sample of large, midsize and emerging manufacturers. All profiled companies are export-oriented professional suppliers that are verified by Global Sources.

Each supplier is confirmed to be authentic with a legally registered business. All companies are visited three or more times to ensure they are export-ready and have real offices and products.

The listed contact person has been verified to represent the registered company. In each case, companies were required to answer specific questions designed to verify their manufacturing and export credentials.

All profiled suppliers participated in a survey designed to provide insight into product and price trends, and challenges facing the industry. All survey questions are single choice.

Suppliers are ranked based on a 6-star ranking system. Companies with a higher star ranking provide more business information and verification reports on their Global Sources online homepages.

Suppliers rated 5 or 6 stars have a Credit Check report from First Advantage or Sino-Trust and a Supplier Capability Assessment report provided by Bureau Veritas online.

The rankings are correct at the time of publication and may be subject to change.

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INDUSTRY OVERVIEW

Mobile connectivity and features integration are driving trends in China's computer terminal industry. These are reflected in the rising number of smaller form factors that boast diverse functions.

While desktop configurations are recovering from a 22 percent output decline last year, their share of the country's aggregate PC yield is still considerably lower than laptop's. The latter contributed 41.9 million units to the 51 million total in 1Q10. Production of tabletop PCs reached only 9 million during the same period.

The emergence of netbooks and ultra-mobile PCs or UMPCs reflects the shift to streamlined industrial designs further. Makers forecast global output of the latter will expand by up to 15 percent this year. As for netbooks, IDC estimates China's annual sales will climb to 3 million units by end-2010 from 1.9 million in 2009. This will hit 5 million units by 2012.

The strong penetration of the iPad will fuel the mobile computing trend even more. This is already evident in the growing number of China manufacturers exploring tablet-type designs. A few have even mentioned considering keyboardless varieties.

Support from upstream partners will enable makers, especially laptop specialists, to produce more compact and lightweight variants. Intel and AMD have introduced special chipsets for such setups. The latest platform from the former, for example, will broaden cost options, particularly for those exploring the ultralow voltage or ULV category. This new-generation low-end processor delivers a minimum power consumption of 5 to 10W.

In terms of features integration, makers' priority is to pack as much functionality even in compact designs to add value further. Besides raising resolution output, more are switching to touchscreens to improve the user interface.

Wireless Internet has become a

standard, and many releases adopt the latest N protocol. Bluetooth and 3G are likewise adopted. Multimedia capability and office applications are also enabled, with home theater support incorporated in a number of units.

Even small form factors such as netbooks can be expected to play high-definition video and online games. The Nvidia Ion2 platform, which integrates the GeForce 9400M chipset, allows such devices to enhance graphics performance.

Notwithstanding increased efforts to boost market positioning through features-laden selections, China suppliers remain oriented toward OEM and ODM business given the line's brand-driven profile. This is also because the country's penetration is still limited to the entry-level and midrange segments as HP, Acer, Dell and Lenovo continue to dominate the upscale sector.

Nevertheless, companies exporting under their own labels are building up overseas channels. A key challenge here is the cost of establishing aftersales support capability. To override this, makers work with agencies in destination countries by sending spare parts and providing regular staff training. These partners also facilitate shipment of products with major defects to service centers in Hong Kong or mainland China. Large suppliers choose the retail market. Shenzhen Hasee Computer Co. Ltd, for instance, cooperates with overseas vendors. In exchange, it offers lower prices to allow partners to profit from the venture as well.

Enterprises are leveraging the country's global PC hub status to boost competitiveness further. The mainland accounts for about 60 percent of worldwide output, based on 1Q10 data from the Ministry of Industry and Information Technology. Global PC shipments hit 84.3 million units during the period, increasing by 27 percent YoY, according to Gartner. The

Supplier summary

Suppliers surveyed	17
Export sales	\$286.5mn
Export ratio	61%
OEM business	43%
Capacity utilized	62%
Annual R&D spending	\$108.9mn
Full-time employees	20,170

Data: All surveyed suppliers

mainland's yield came close to 51 million units during the first quarter, jumping 55 percent YoY.

To complement production and R&D initiatives, mainland suppliers are undertaking cost-reduction programs. Some large enterprises plan to set up offices abroad to advance this objective. A few laptop providers are exploring transferring manufacture to inland areas, notably Chongqing municipality. This is forecast to become a major hub in the years ahead because of the strong presence of Taiwan operations there.

Desktop computers

While the economic downturn presented back-to-back challenges of slumping sales and a strengthening portable segment, it provided a much-needed impetus for China's desktop PC industry. Suppliers leverage the performance-to-price ratio advantage of tabletop configurations, offering practical solutions with more features yet at lower prices and maintenance costs than laptops.

Recognizing evolving market needs at the same time, makers are increasing the development and manufacture of transition products such as panel or all-in-one PCs. Packaging desktop performance in space-saving and easy-carry configurations has proven effective, in fact contributing largely to the sector's resurgence postcrisis.

Founder Technology Group Corp. and Shenzhen Hasee have been exporting the second type since last year. The latter said this line's outbound shipments already exceeded traditional units as early as 4Q09.

B-Link Electronic Ltd



Expansion cards account for 75 percent of B-Link's total annual sales. The company earned \$60 million from the line last year. The selection includes sound and IEEE 1394 cards. Half a million units are exported per month, with the bulk going to Europe and the Americas.

B-Link aims to increase overseas sales by more than 20 percent, and as such will boost marketing efforts in North America in coming months. ODM orders account for 40 percent of exports, and the rest is divided between OEM and OBM.

The Guangdong province-based maker operates a 15,000sqm factory with a monthly capacity of 700,000 expansion cards. Production averages 600,000 units a month.

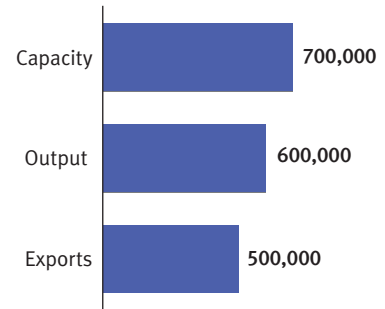
Processes comply with ISO 9001:2000. Most are conducted in-house, except for plastic injection and shock/vibration testing.

The workforce totals 300, with 30 assigned to R&D and 20 to QC.

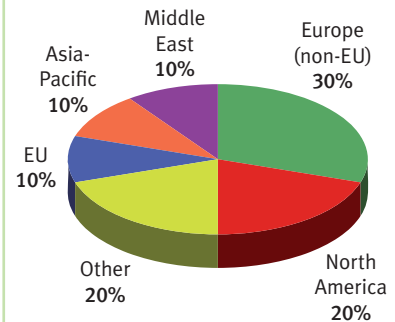
The company has been named the Civilized and Integrity Enterprise of the year by Shenzhen's business administration department.

Profile

Production units/mth



Export markets



Contact details

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Company facts

Year established	1997
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Shenzhen (Guangdong)
Number of factories	1
Factory location(s)	Shenzhen (Guangdong)
Total factory area	15,000sqm
No. of full-time employees	300
No. of R&D/design staff	30
No. of QC staff	20
Annual sales (all products)	\$80.0mn
Annual R&D spending	\$10.0mn
ISO certification	Yes

Sales & output: Computer terminals

Annual sales	\$60.0mn
Share of total sales	75%
Annual export sales	\$50.0mn
Total monthly capacity	700,000 units
Average monthly output	600,000 units
Capacity utilized	86%
Average monthly exports	500,000 units
Export ratio	83%
OEM % of exports	30%
ODM % of exports	40%
OBM % of exports	30%
Other products made	Ethernet switches; HDD portable media and HDMI DVD players; external fax modems; FM transmitters

Capability

In-house processes

Cosmetic design	Yes
PCB subassembly	Yes
Mold making	Yes
Plastic injection	No
SMT	Yes
Software development	Yes
Shock/vibration testing	No

Exports by product

Desktop computers	—
Portable/mobile computers	—
Expansion cards	100%

Exports by market

North America	20%
European Union	10%
Europe (non-EU)	30%
Asia-Pacific	10%
Middle East	10%
Other	20%

Survey

- **Export prices**
Increased
- **Export price increase**
Less than 5%
- **Export sales**
Increase more than 20%
- **Target market**
North America
- **Capital expenditure**
Increase up to 50%
- **Major challenge**
Cost of raw materials
- **Export capability**
Improve operating efficiency
- **R&D focus**
Develop energy-saving designs

Popular export models



Expansion card

Model	BL-SU71
MOQ	1,000 units
Packaging	Colored box
Delivery	20 days
Price	\$20

Description: External sound card; SPDIF; 7.1 channels, HRTF 3D positional audio; front, rear, center, bass, line, microphone connectors; CE, FCC, RoHS



Expansion card

Model	BL-1394
MOQ	1,000 units
Packaging	Colored box
Delivery	25 days
Price	\$6

Description: Built-in IEEE 1394 card; 32-bit PCI bus, PCI 2.2, FireWire, 1394 Open HCI 1.0 and 1.1, HPSB; 100 to 400Mbps data rate; three 6-pin external and one 4-pin internal 1394 connectors; 33MHz bus speed; Windows 98 SE, ME, 2000, XP, NT 4.0, XP x64, Vista, Linux, Mac OS; CE, FCC, RoHS



Expansion card

Model	BL-P6315
MOQ	1,000 units
Packaging	Colored box
Delivery	25 days
Price	\$8

Description: Built-in IEEE 1394 card; Via chipset; PCI Express, FireWire, ExpressCard; 400Mbps data rate; CE, FCC, RoHS

PRODUCT GALLERY

Desktop computers



Founder Technology Group
(profile page 40)
Model: Founder XYT-360
MOQ: 200 units
Packaging: Carton
Delivery: 30 days
Description: All-in-one PC; Intel Pentium Dual-Core E6300 2.8GHz CPU, Nvidia 512MB graphics card, Intel G41 Express Chipset; 2GB DDR2; 320GB 7,200rpm SATA HDD; DVD-RW drive; 21.5in TFT LCD; 802.11b; built-in 1.3MP webcam, 4-in-1 card reader; 10W 2-channel speakers; <25dB noise



Founder Technology Group
(profile page 40)
Model: Founder JYM-530
MOQ: 200 units
Packaging: Carton
Delivery: 30 days
Price: Negotiable
Description: Desktop computer; Intel Core 2 Duo E8400 CPU, G41 Express Chipset; 2GB DDR3; 320GB 7,200rpm SATA HDD; DVD-RW drive; 150,000hr MTBF; 28dB noise; standard keyboard and mouse; EMC Class B, CCC, RoHS



Shenzhen Hasee
(profile page 48)
Model: PQ760
MOQ: 100 units
Packaging: Carton
Delivery: 25 days
Description: Intel Core 2 Duo T6570 2.1GHz CPU, Intel G31M chipset, integrated Intel GMA X3100 graphics card; 2GB DDR2; 250GB SATA HDD; DVD±RW drive; 17.3in WXGA LCD; 10/100Mbps Ethernet LAN, 802.11b/g/n; 4-in-1 card reader; standard keyboard and optical mouse



Wuchuangxing
(profile page 58)
Model: F229A
MOQ: 50 units
Packaging: Box
Delivery: 10 days
Price: \$466
Description: All-in-one PC; Intel Pentium Dual-Core E5200 2.5GHz CPU; 2GB DDR2-800; 320GB SATA II HDD; 22in widescreen LCD, 1680x1050 pixels; TV function in PAL, SECAM, NTSC; CCC, CE



Wuchuangxing
(profile page 58)
Model: F179A
MOQ: 50 units
Packaging: Box
Delivery: 10 days
Price: \$380
Description: All-in-one PC; Intel Pentium Dual-Core E5200 2.5GHz CPU; 2GB DDR2-800; 320GB HDD; 17in widescreen LCD, 1024x768 pixels; CCC, CE



Wuchuangxing
(profile page 58)
Model: F429A
MOQ: 50 units
Packaging: Box
Delivery: 10 days
Price: \$955
Description: All-in-one PC; Intel Pentium Dual-Core E5200 2.5GHz CPU; 2GB DDR2-800; 320GB HDD; 42in widescreen LCD, 1920x1080 pixels; TV function in PAL, SECAM, NTSC; CCC, CE

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