

# Computer Monitors



December 2008 US\$495



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# COMPUTER MONITORS

## *Supplier capability in China*

### EXECUTIVE SUMMARY

Leading the growth of China's computer monitor industry is the LCD monitor segment. Although sales and demand for LCD monitors experienced a slight sag in 2008, China suppliers are nevertheless positive of continuous growth in this line. China customs data shows that the region's LCD monitor exports from January to August 2008 rose by 4.85 percent over the same period in 2007. In contrast, China's exports of CRT monitors in the same months plunged 60.6 percent compared to the same period in 2007.

A major factor affecting shipments from China is the global financial crisis. Waning sales coupled with rising production costs have resulted in decreased profitability for suppliers. Small-scale and mid-sized makers are the hardest hit as they rely heavily on price competitiveness. To stay afloat, many of these makers will reduce their dependence on the export market, especially to the US, and refocus their business on the domestic market.

Decreased consumer spending brought about by the financial meltdown has also resulted in many suppliers leaving the line. In addition, a number of suppliers are expected to cease production of 17in LCD monitors beginning 1H 2009 due to the decreasing supply of 17in LCD panels. The supply of 17in and smaller panels are predicted to decline as more LCD panel suppliers shift their production to larger panels.

The increase in LCD monitor supply is expected to come from the 18.5in segment prompted by the release of 18.5in LCD panels in early 2008. Currently, there are only a few makers of 18.5in LCD monitors but supply is projected to eventually scale up.

The following are some of the trends we see in China's computer monitor industry:

- Export prices are generally expected to either remain the same or

increase in the coming months. The price increase is largely due to rising production and raw material costs. Price drops will mainly be seen in large-size monitors as more suppliers output 18.5in LCD panels.

- The EU region will be the primary target export market with the US becoming less of a priority market among many suppliers. Makers will focus on widening their product range and shortening design/development time to strengthen their export capability.

- The general trend among China makers is to maintain their current capacity but suppliers featured in this report indicate that they will expand their capacity to cope with an anticipated demand surge in the coming months.

- Product development efforts will mainly center on integrating multimedia functions and HDMI/DisplayPort connectivity. Much of these R&D efforts will be concentrated on 18.5in models but some makers will hold off immediate R&D plans in this segment in view of uncertainties about the long-term supply of 18.5in LCD panels.

This report covers 14in and above LCD monitors. The supplier survey was conducted on manufacturers of 14in and above LCD monitors, as well as industrial monitors. The Industry Overview section explains the growth of China's LCD monitor industry and the challenges facing suppliers. It details the emerging trends, panel supply and price direction.

China has an estimated 120 manufacturers of LCD monitors. Most of the locally owned suppliers are based in Guangdong province, while many Taiwan-owned makers have facilities in Jiangsu province. The majority of China's suppliers are OEM and ODM providers although many companies sell a percentage of their output under their own-brand names.

### In this report

- 15 in-depth company profiles
- 44 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 may or may not be clients of Global Sources.

The selection of suppliers is designed to reflect the composition of the industry in China in terms of geographic spread, business type and company ownership.

For each company profile, our research teams interviewed senior executives and export managers who discussed their recent performance and provided price, R&D, production and export forecasts for the next 12 months. The interviews were done in-person, by phone or email.

In each case, companies were required to answer specific questions designed to verify their manufacturing and export credentials, including their production and export statistics, and a breakdown of exports by product type and market. Our production checklist details the product-specific manufacturing capabilities of each supplier.

All suppliers participated in a survey designed to provide insight into product and price trends, and challenges facing the industry in the next 12 months. All survey questions are single choice. Results were calculated based on the actual number of valid responses to each question.

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## INDUSTRY OVERVIEW

China's suppliers of LCD monitors are confident of continued growth in the region's LCD monitor line despite the slight drop in demand and sales in 2008 due to the global economic situation. Data from China customs shows that China's exports of LCD monitors for the period January to August 2008 reached 73.97 million units, a rise of 4.85 percent over the same period in 2007. The growth rate is small compared with previous years' growth, but is still indicative of positive movement as opposed to developments in the CRT monitor sector. China's exports of CRT monitors hit 29.06 million units from January to August 2008, a 60.6 percent drop from the region's exports for the same period the year before.

The global financial crisis is expected to negatively affect makers' export shipments in 2009, especially companies whose main export market is the US. The thinning of the supplier base in China, which started in Q3 2007 and has left the region with no more than 120 makers as of Q3 2008, could continue as more companies feel the brunt of decreased consumer spending due to the financial meltdown.

Dampened sales and rising production costs will erode profit

margins, particularly of smaller players that rely extensively on price competitiveness. Many of these small, and even medium-scale, companies are starting to reduce their dependence on the export market and are instead boosting their domestic business as a way of staying afloat.

More exporters are setting their sights on Europe and Asia as the major markets. Although many companies are looking to reduce their shipments to the US, other suppliers are planning to strengthen their position in the US and Europe.

The majority of China suppliers focus on providing OEM and ODM services. Many companies have started exploring own-brand manufacturing (OBM) in recent years, but continue to face difficulties in establishing their brands in the international market.

In general, companies plan to maintain their current production capacity, claiming their capacity will suffice to support the current demand. At 60 to 70 percent utilization rate in H2 2008, makers are confident they have ample capacity to meet any spike in demand, at the same time adapt to change should demand weaken in the coming months.

### Supplier summary

Suppliers surveyed	15
Export sales	\$534.8mn
Export ratio	67%
OEM business	58%
Capacity utilized	53%
Annual R&D spending	\$49.4mn
Full-time employees	19,068

Data: All surveyed suppliers

### Supply of 17in models waning

Decreasing supply of 17in LCD panels is pushing 17in LCD monitors out of the mainstream in China. As more LCD panel suppliers shift their focus to larger panels, supply of 17in and smaller panels will continue to decline. Leading suppliers such as Samsung, LG Display and CPT started releasing more 18.5in and 21.5in LCD panels in Q2 2008, thereby encouraging more China suppliers to develop larger monitors.

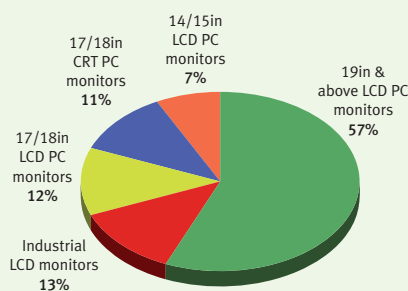
Some makers estimated that only two or three suppliers have remained active in producing 17in LCD panels as of end-2008. To reflect this development, more China companies of 17in LCD monitors are expected to leave the line in H1 2009.

Surviving 17in LCD monitor makers will have to find new ways to

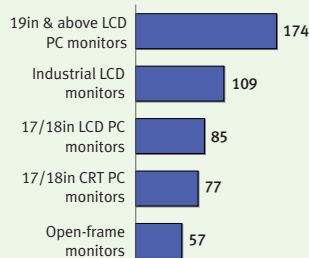
### Global Sources metrics

The following metrics are taken from buyer and supplier activity in the computer monitor category for October 2008. Visit [Global Sources Online](#) and sign up for Product Alert to receive the latest supplier postings. Use the website's Product Search function to find more computer monitors and send inquiries directly to verified exporters.

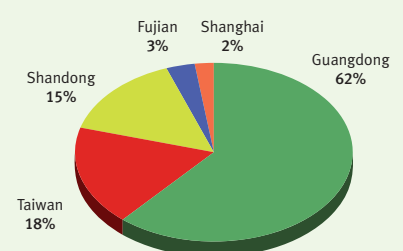
#### Top buyer requests



#### Top product profiles



#### Buyer inquiries by region



Results are derived from buyer and supplier website activity conducted on [www.globalsources.com](#).

### Anbonn Inc.

Anbonn is a Taiwan-owned company specializing in HDTVs, LCD TVs, and CRT and LCD computer monitors. It has a manufacturing facility in Guangdong and sales and branch offices in various parts of the world including Hong Kong, the Philippines and the Netherlands.

The company's OBM products carry the brand names Anbonn and Alphasync. The brand Tornado is for AVR and UPS products. One-year warranties are provided on all Anbonn- and Alphasync-branded products. Products have FCC, CE, TÜV and

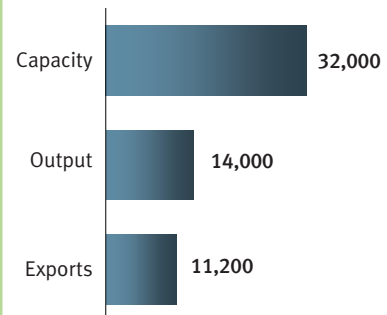
CB approvals, and are UL-listed. The company maintains an acceptance rating of 99 percent for all products.

Anbonn operates its factory based on ISO 9001:2000 standards. It sources LCD panels from LG Display, Samsung, AUO and CPT.

Anbonn allots over 2 percent of total sales to product development. Its R&D team develops 12 new products every year. The company's L-42B2UPF—a 42in LCD TV—was selected as a finalist in the Flat Panel TVs category in Global Sources' Electronics Design Awards 2008.

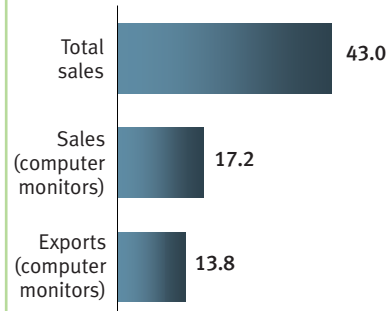
#### Production

units/mth



#### Sales

\$mn/year



#### Contact details

##### Business contact

CHUA Vincent

##### Phone

(886-4) 2297-4984

##### Fax

(886-4) 2293-9903

##### E-mail

sales@anbonn.com

##### URL

www.anbonn.com

www.globalsources.com/anbonn.co

##### Address

No. 1, Lane 83, Wen Chang East 1 St, North Dist, Taichung, Taiwan

#### Company facts

Year established	1995
Business type	Manufacturer
Company ownership	Taiwan-owned/invested
Head office location	Taichung (Taiwan)
Factory location(s)	Heshan (Guangdong)
Total factory area	25,000sqm
No. of full-time employees	200
Annual sales (all products)	\$43.0mn
Annual R&D spending	\$1.20mn
ISO certification	Yes

#### Sales & output: Computer monitors

Annual sales	\$17.2mn
Share of total sales	40%
Annual export sales	\$13.8mn
Total monthly capacity	32,000 units
Average monthly output	14,000 units
Capacity utilized	44%
Average monthly exports	11,200 units
Export ratio	80%
OEM % of exports	70%
ODM % of exports	—
OBM % of exports	30%
Other products made	Digital photo frames, HDTVs, LCD advertising players, 10in and above home LCD TVs, 9in/10in LCD computer monitors, CRT computer monitors

### Capability

#### Production checklist

In-house R&D/design staff	10
Production line QC staff	20
Mold making in-house	No
Plastic injection in-house	No
SMT in-house	No
Final assembly in-house	Yes
QC/QA testing in-house	Yes

#### Exports by product

14in/15in LCD monitors	40%
17in/18in LCD monitors	30%
19in & above LCD monitors	30%
Industrial monitors	—

#### Exports by market

North America	5%
European Union	20%
Europe (non-EU)	5%
Asia/Pacific	50%
Middle East	10%
Other	10%

### Outlook

- **Export prices**  
Decrease
- **Export price decrease**  
5-10%
- **Export sales**  
Increase less than 10%
- **Target market**  
European Union
- **Production capacity**  
Increase 20-50%
- **Major challenge**  
Cost of raw materials
- **Export capability**  
Shorten design/development time
- **Major product trend**  
Higher screen resolution

### Popular export models



#### 14in/15in LCD monitor

Model	L5F2S
Minimum order	300 units
Packaging type	Box
Delivery time	15 days
Indicated price	\$110.00

**Description:** 15in screen; 1024x768-pixel resolution; 15ms response time; 500:1 contrast ratio; 250cd/m<sup>2</sup> brightness; 35W power consumption; 100V to 240V AC, 50Hz to 60Hz, 12V DC, 4A input/output; HDMI, VGA, A/V, S-Video, YPbPr interface; built-in speaker; 4kg



#### 19in & above LCD monitor

Model	L-9C3UW
Minimum order	100 units
Packaging type	Box
Delivery time	15 days
Indicated price	\$185.50

**Description:** 19in screen; 1440x900-pixel resolution; 5ms response time; 1100:1 contrast ratio; 350cd/m<sup>2</sup> brightness; 48W power consumption; 100V to 240V AC, 50Hz to 60Hz, 12V DC, 4A input/output; HDMI, YPbPr, A/V, S-Video interface; 3D noise reduction; 6.5kg



#### 19in & above LCD monitor

Model	L-32B3UW
Minimum order	100 units
Packaging type	Box
Delivery time	15 days
Indicated price	\$441.00

**Description:** 32in screen; 1366x768-pixel resolution; 5ms response time; 1200:1 contrast ratio; 500cd/m<sup>2</sup> brightness; 180W power consumption; 100V to 240V AC, 50Hz to 60Hz, 12V DC, 4A input/output; HDMI, VGA, A/V, S-Video interface

PRODUCT GALLERY

19in & above LCD monitors



**Anbonn**  
(profile page 22)  
**Model:** L-9C3UW  
**Minimum order:** 100 units  
**Packaging type:** Box  
**Delivery time:** 15 days  
**Indicated price:** \$185.50  
**Description:** 19in screen; 1440x900-pixel resolution; 5ms response time; 1100:1 contrast ratio; 350cd/m<sup>2</sup> brightness; 48W power consumption; 100V to 240V AC, 50Hz to 60Hz, 12V DC, 4A input/output; HDMI, YPbPr, A/V, S-Video interface



**Anbonn**  
(profile page 22)  
**Model:** L-32B3UW  
**Minimum order:** 100 units  
**Packaging type:** Box  
**Delivery time:** 15 days  
**Indicated price:** \$441.00  
**Description:** 32in screen; 1366x768-pixel resolution; 5ms response time; 1200:1 contrast ratio; 500cd/m<sup>2</sup> brightness; 180W power consumption; 100V to 240V AC, 50Hz to 60Hz, 12V DC, 4A input/output; HDMI, VGA, A/V, S-Video, YPbPr interface



**China Great Wall Computer**  
(profile page 24)  
**Model:** M9WGL  
**Minimum order:** 1,000 units  
**Packaging type:** Carton  
**Delivery time:** 30 days  
**Indicated price:** •  
**Description:** 19in screen; 1440x900-pixel resolution; 5ms response time; 1000:1 contrast ratio; 5000:1 dynamic contrast ratio; 350cd/m<sup>2</sup> brightness; 0.284x0.284mm pixel pitch; 135MHz bandwidth



**China Great Wall Computer**  
(profile page 24)  
**Model:** M9WHK  
**Minimum order:** 1,000 units  
**Packaging type:** Carton  
**Delivery time:** 30 days  
**Indicated price:** •  
**Description:** 19in screen; 1440x900-pixel resolution; 5ms response time; 1000:1 contrast ratio; 300cd/m<sup>2</sup> brightness; 0.284x0.284mm pixel pitch; 135MHz bandwidth



**HEDY**  
(profile page 30)  
**Model:** L1907  
**Minimum order:** 200 units  
**Packaging type:** Carton  
**Delivery time:** 14 days  
**Indicated price:** \$125.00  
**Description:** 19in screen; 1440x900-pixel resolution; 8ms response time; 800:1 contrast ratio; 300cd/m<sup>2</sup> brightness; 38W power consumption; 100V to 240V AC, 50Hz to 60Hz, 12V DC input/output; optional SPK/DVI; 4.4kg



**HEDY**  
(profile page 30)  
**Model:** L2201  
**Minimum order:** 200 units  
**Packaging type:** Carton  
**Delivery time:** 14 days  
**Indicated price:** \$137.00  
**Description:** 21.6in screen; 1680x1050-pixel resolution; 5ms response time; 1000:1 contrast ratio; 300cd/m<sup>2</sup> brightness; 50W power consumption; 100V to 240V AC, 50Hz to 60Hz, 12V DC input/output; S-Video, A/V interface; 6kg; TV cable

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