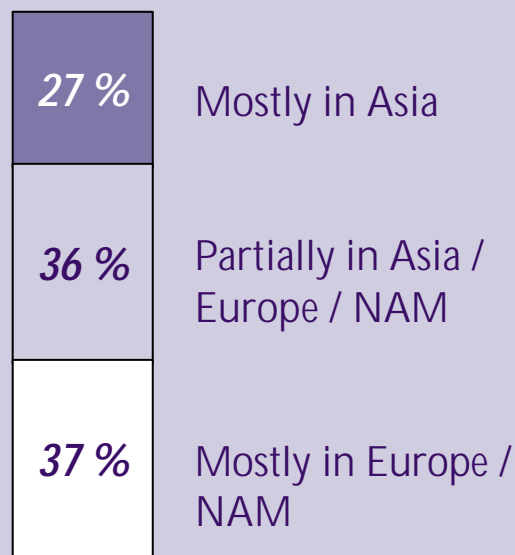


# Asia Is driving competition in terms of supply, demand, and innovation – BenQ is well positioned

## Component manufacturer

Cost split of a high-end mobile phone (example) in percent

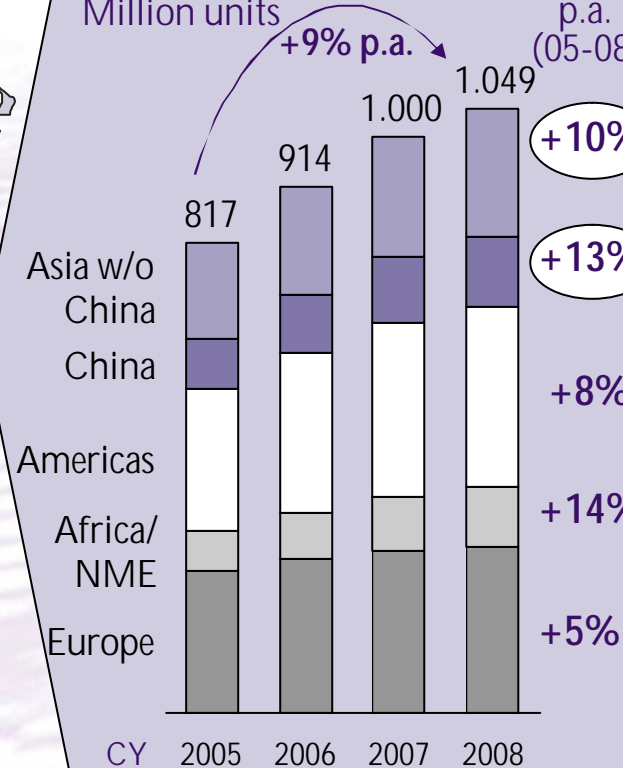


## Innovation setter

- Form factor
- Applications
- Hardware
- Convergence

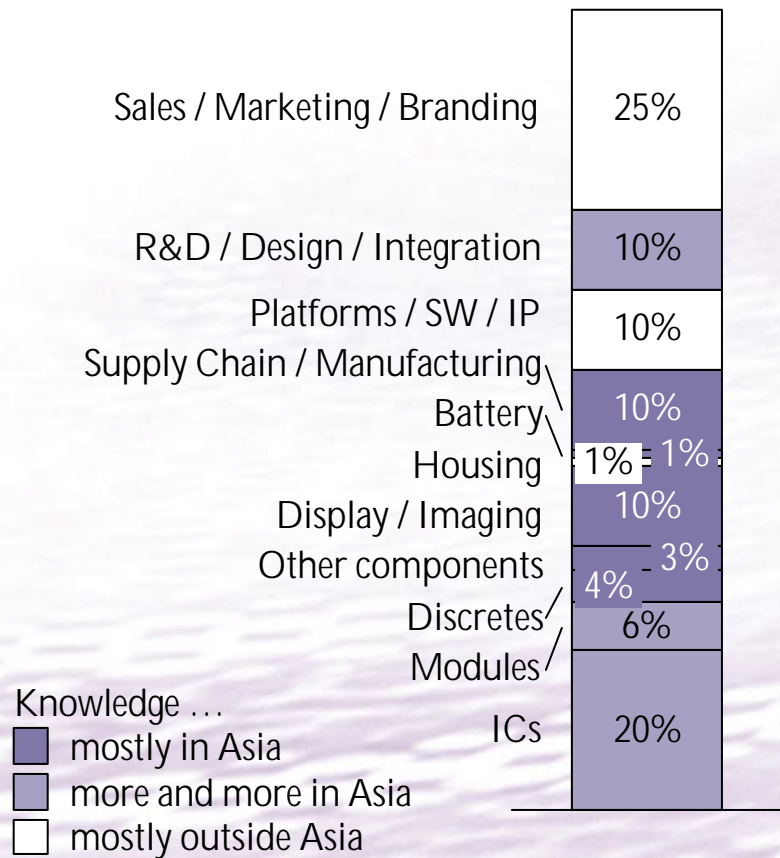
## Demand driver

Market size by region  
Million units



# Knowledge of key components and production is increasingly based in Asia

## Cost split of a high-end mobile phone (exemplified)



## In-house competencies

**BenQ**

- R&D / Design / Integration / Supply Chain / Manufacturing (BMG PHA)
- TFT-LCD panels (AU Optronics)
- Optical component and module (Copax Photonics)
- Passive components (Darfon Electronics)
- Semicon foundry for wireless communication and opto-electronics chips (Suntek)
- Wireless communication IC design (Airoha Technology)

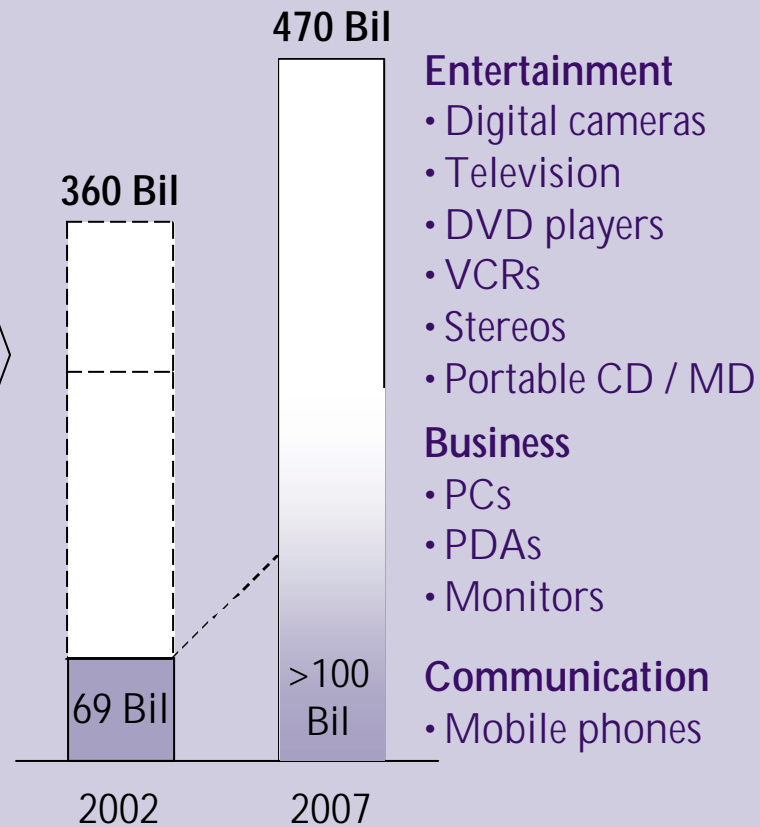
**BenQ**

# BenQ will manage upcoming portfolio challenges by leveraging its 3C competencies

## Trend towards 3C convergence ...

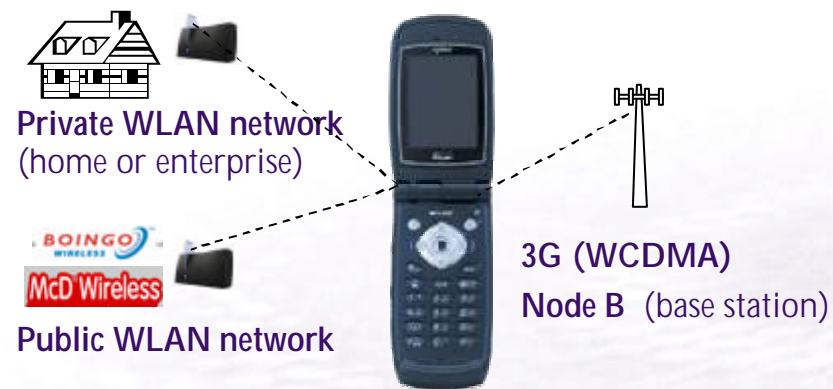


## ...will increase our addressable market



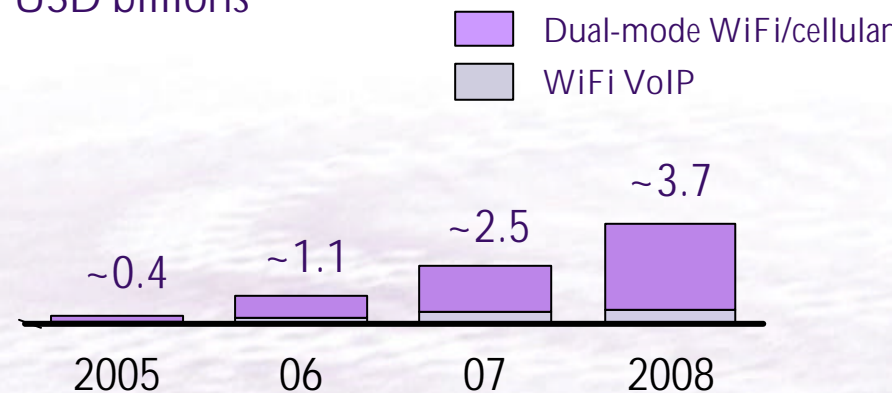
# New device categories will emerge, featuring digital convergence technologies

## Dual-mode WiFi phone



## Global WiFi handset sales (forecast)

USD billions



## DVB-H phone



## EU15 DVB-H handset shipment (forecast)

Million units

