

## TSMC, Goertek, Desay, Alps, Foster Seen Supplying iPhone 6 Parts By Jennifer Tan

Sept. 9 (Bloomberg) -- Apple expected to unveil 2 new iPhones and wearable device at event: people familiar.

- One device likely to have 4.7-inch screen, 2nd model with 5.5-inch display; some analysts refer to 5.5-inch model as iPhone 6L or iPhone Air
- Expect new iPhones to include 20nm A8 chip, near-field communication (NFC), improved front-facing camera, 128GB storage option for 5.5-inch model; focus on features such as HomeKit, HealthKit: RBC
- New models may offer NFC, optical image stabilization, haptic reactors to replace previous vibration motors: Nomura analysts Manabu Akizuki and Anne Lee in Sept. 5 note
- See Apple event preview; event live stream
- iPhone 6 suppliers include (data from Deutsche Bank, Yuanta, KGI, and Fubon Securities):
  - TSMC: manufactures Apple's A8 application processor
  - Samsung Electronics: mobile DRAM
  - Hon Hai/Pegatron/Wistron: assembly
    - Hon Hai to get 65% of 4.7-inch device orders, almost 100% of 5.5-inch orders; Pegatron to be allocated 25% of 4.7-inch orders, Wistron 5%-10% 5.5-inch orders: Yuanta
  - LG Display/Japan Display/Sharp: in-cell touch
  - Wintek: touch panel
  - Sony: CMOS sensor
  - Cowell/LG Innotek/Sharp: camera module
  - Genius/Largan: lens module
    - Largan may obtain 90% of orders to supply back camera, Genius may get 80% front camera orders: Yuanta
  - AAC Tech/Goertek: acoustics
  - Goertek/Foster: earpods
  - Foxconn Tech/Catcher/Green Point/Casetek: casing
    - Foxconn may get 10%-15% of casing orders; Catcher to supply 15%-20% of 4.7-inch casings: Yuanta

- Desay/Simplo: battery pack
- Compeq/Ibiden/Unimicron/Tripod: PCB
- Zhen Ding/Flexium/Career/NOK/Fujikura: flexible PCB
- Nihon Dempa Kogyo/TXC: quartz crystal
- Alps/Mitsumi: voice coil motor
- Cheng Uei: connector
- Longwell: adaptor converter
- Other U.S. suppliers include: GT Advanced, Integrated Device Technology, InvenSense, NXP Semi, On Track Innovations, Universal Display, Qualcomm, Jabil, Broadcom, Corning: data from filings, reports incl. OTR Global, Pacific Crest, Deutsche Bank
- 5.5-inch model may ship at later date vs 4.7-inch, with shortages throughout holidays: Barclays
- Smartwatch will be shown at Sept. 9 event: WSJ; IWatch may be shown at event: Barclays
- See complete AAPL supply chain
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