

Ivent Solutions Market Trend Update

October 2020

TFT Supply Chain Pressure

The trade war between China and the USA is starting to put pressure on the price of TFT panels, as advised by DLC Display. Pricing on components across the board has been on the increase but this is the first notification seen around TFT displays. Price levels on monochrome displays such as TN, FSTN, VATN appear to be stable at this point in time. The increases seem to be affecting most small sizes of TFT from 2.8" up to 7". Production capacity of the driver IC's and bare cells is also extremely tight which is accentuating this problem. Aside from pricing, leadtimes are also extending. The recommendation from DLC in particular is for forward orders to be placed to lock in current price levels and mitigate the extending leadtimes.

Chinese New Year is Fast Approaching... Plan Ahead NOW!

It sometimes seems crazy to start talking about Christmas at this time of year, especially when you see decorations up in retail stores and hear the annoying jingle of carols rolling out through the local mall. However, the classic Kiwi Christmas shut-down over summer has much less of an impact on the supply chain than Chinese New Year. Once you hear Snoopy's Christmas pumping out in Whitcoulls it is definitely time to start considering your own supply chain of product to mitigate potential risk. This year China will close down from February 12th to February 26th 2021. This is only for two weeks, but the impact is much greater. Many workers do not return from their towns and villages after the New Year is complete leaving production capacity reduced for at least another two weeks. It would be entirely reasonable to consider all of February and perhaps the first week or two of March to be added to standard production leadtimes.

Shipping Channels from Asia to New Zealand

The space situation on the Asia to New Zealand trade lane continues to deteriorate. Most shipping lines are only accepting bookings at priority rates over the next month. In some cases, they are unable to accept any new bookings due to the ever-increasing backlog at their trans-shipment hubs throughout Asia. Forward bookings with all shipping lines remain incredibly strong and they anticipate that this situation will remain until early next year leading into Chinese New Year 2021. This is an unprecedented situation in terms of the current market conditions. It is important that all importers plan and prepare their supply chains for these ongoing and substantial delays.



IVENT CHRISTMAS CLOSDOWN DATES:

23RD DECEMBER TO 11TH JANUARY



After eating all my quarantine snacks



When you find out your normal daily lifestyle is called "quarantine"



STAY HOME



UNLESS YOU WANT TO BE INTUBATED BY A PSYCHIATRIST

HEY GOING TO THE STORE



DO YOU NEED ANYTHING?

imgflip.com

What if 2020 is just a trailer of 2021 ?

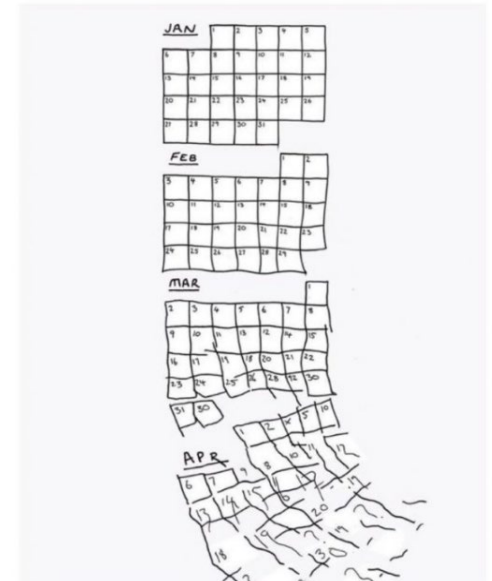


"2020 can't get any worse"

June:



Thought I'd draw a more accurate calendar for 2020 so far....



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NZD versus AUD - AU\$0.905 vs NZ\$1.00 ↓



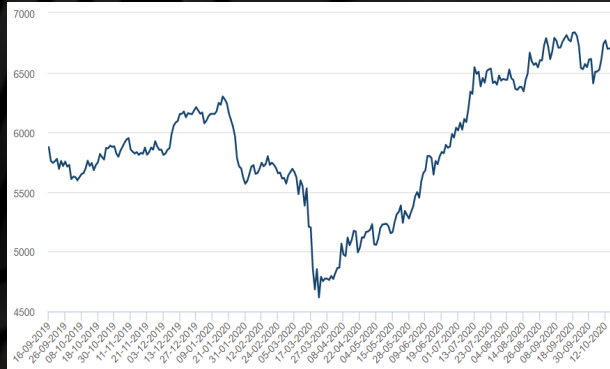
NZD versus USD - US\$0.660 vs NZ\$1.00 ↓



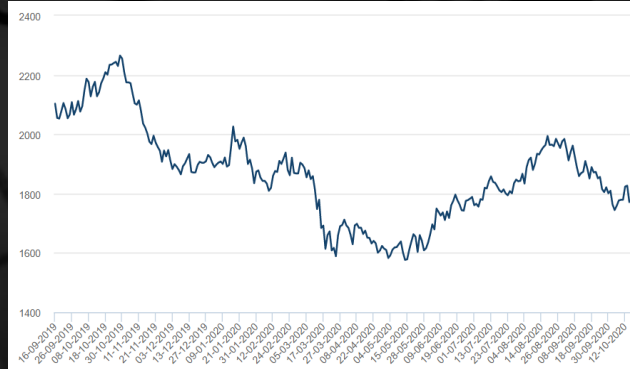
NZD versus EUR - EU\$0.565 vs. NZ\$1.00 ↑



Copper - USD6800 / tonne ↑



Lead - USD1850 / tonne ↓



Nickel - USD15000 / tonne ↓



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This Month in Tech History...

October 9, 1876 – Alexander Graham Bell and Thomas Watson demonstrate the first two-way phone call over outdoor wires. Bell and Watson made their call between the cities of Boston and Cambridge.

October 15, 1878 – Thomas Edison and a group of investors form the Edison Electric Light Company.

October 6, 1942 – Chester Carlson is issued a patent on a process called electrophotography, now commonly known as photocopying. It was not until 1946 that a company had any interest in pursuing photocopying commercially. The Haloid Company finally licensed Carlson's patent and created the word xerography to differentiate the process from traditional photography. Eventually, photocopying became such a large part of the company's revenue that Haloid changed their name to Xerox.

October 3, 1950 – AT&T Bell Laboratories researchers John Bardeen, Walter Brattain and William Shockley receive a US Patent for their invention of the transistor, which they had successfully demonstrated two years earlier. The top end Intel I9 CPU (7980xe) has a transistor count estimated to be around 7 billion... how times change!

October 4, 1957 – The first man-made satellite to orbit the Earth, Sputnik 1, is launched from Baikonur, Kazakhstan, marking what is now considered the beginning of the Space Age. Surprising the world with its successful launch, Sputnik triggered the Space Race between the Soviet Union and United States ushering in an era of rapid advancement in the field of space exploration. After 3 months in orbit, Sputnik reentered the Earth's atmosphere and burned up on January 4, 1958.

October 10, 1980 – Midway releases the video game Pac-Man to arcades in North America.

October 1, 1982 – The first commercial compact disc player, the Sony CDP-101 goes on sale in Japan.

October 5, 2011 – After a long battle with pancreatic cancer, technology visionary and founder of Apple Computer, Steve Jobs passes away. Jobs' contributions to the technology industry are undeniable. Together with Steve Wozniak, Steve Jobs started the personal computer revolution with their Apple II computer. After being forced out of Apple, Jobs went on to found NeXT, Inc. and then purchase Pixar, the company that would redefine the animated motion picture industry. In 1997, Apple purchased NeXT which brought Jobs back to Apple and the technology developed at NeXT was used as the foundation for Apple's future operating systems, Mac OS X and iOS. By introducing the iPhone and iPad, he ended the PC era he created, kickstarted The New World of Technology and led Apple from the brink of collapse to the most valuable company in the world.

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