Amazon appears to be conservative to adopt OGS (One Glass Solution) for the upcoming 6” Kindle and 7” and 8.9” Kindle Fire in 2012

Description: We clarify that most OGS touch panel makers Wintek and Cando might have recently failed to design in their OGS panel for most Amazon's 6” Kindle, 7” and 8.9” Kindle Fire products in 2012. On the other hand, it seems that HTC also recently changed to adopt G/F/F type of touch panel to replace OGS for their 3.7” One V Smartphone in March. We reiterate that Apple has a lower possibility to adopt OGS for 7.85” iPad mini. Based on the above aforementioned, the adoption rate of OGS is not as fast as what we expected at this point of time.

Isaiah's Key Takeaways from our research:

1. G/G type of touch panel remains to be the mainstream for Amazon's Kindle products.

2. Cando and Wintek are expected to be touch panel suppliers for 6” Kindle.

3. Wintek and CMI are likely to be touch panel suppliers for 7” and 8.9” Kindle Fire.

Figure: Amazon 6” Kindle, 7” and 8.9” Tablet supply chain overview


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