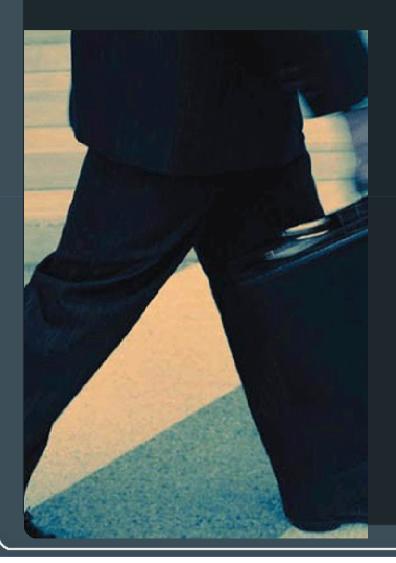


Global LED Industry Report, 2008



Since 2002, LED has been developed rapidly caused by the wide application in mobile phones. With the improvement of LED luminescence efficiency, LED has got rid off the reliance on mobile phone industry and enters the semiconductor lighting era. LED development has the following four trends:

Firstly, vehicle lighting. Currently, break lights is the main LED application for vehicle. The market penetration rate was 53% in 2007; the figure will increase to 85% by 2011. In addition, the penetration rate of vehicle LED taillight was close to 15%, and the figure is expected to reach 38% by 2011. Moreover, Cadillac Escalade was the first car adopting LED both in high beam and low beam in the world, signifying that LED has entered the headlight era. Taiwan Everlight will also start the mass production of LED headlight as early as Q3 2008; the client is China DongFeng Motor Corporation.



Secondly, laptops and other medium and small-size backlights, especially the laptop below 14-inch. However, the IT industry is suffering slowdown, manufacturers have greatly cut down the cost, and the wide application of LED has to wait for the industry recovery.

Thirdly, social activities and screen adverting. The application in the opening ceremony of Beijing Olympics was a typical achievement. Especially in China, the governments are enthusiasm at huge LED screens; the one in Shanghai Financial Center cost RMB 100 million.

Fourthly, general lighting. Street lights and flashlight are more potential. The energy-efficient and environment-friendly is the advantages of LED street lights, considering the overall cost, LED street lights only slight higher than sodium lights.



Rank of Global LED EPI-Wafer Manufacturers, 2007

Manufacturer	Turnover	(USD
	million)	
Nichia		422
Osram		410
Philip		395
Cree		394
Epistar		319
Seoul		279
Semiconductor		
Opto		169
Toyoda Gosei		146
Aocepi		98
Tyntek		94
Lianchuang		82
HUGA		59
San'an		47
Formosa		45
Genesis		33
Tekcore		29

Source: ResearchInChina

Rank of Global LED Downstream Manufacturers, 2007

Manufacturer	Turnover	(USD
	million)	
Citizen	375	
LITEON	334	
Everlight	308	
Bright	111	
Dongbei	99	
Kingbright	99	
Stanley	96	
AOT	84	
LDC	28	
Silan Azure	24	

Source: ResearchInChina



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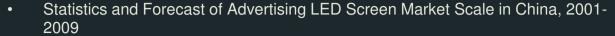
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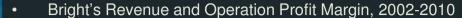
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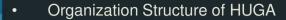
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