

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 Semiconductor	279
Opto	169
Toyoda Gosei	146
Aocepi	98
Tyntek	94
Lianchuang	82
HUGA	59
San' an	47
Fornosa	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

Table of Contents

- **1 Overview of LED Industry**
- 1.1 Introduction
- 1.2 LED Industry Chain
- 1.3 LED Patents
- 1.3.1 White LED Patents
- 1.4 LED Terms

- **2 LED Market**
- 2.1 Overview
- 2.2 High-brightness LED Market
- 2.3 Medium and Small Sized LED Display
- 2.4 LED Laptops
- 2.5 LED Liquid Crystal TV
- 2.6 Vehicle LED
- 2.6.1 Overview
- 2.6.2 Vehicle Lighting Market
- 2.6.3 Vehicle LED Market
- 2.6.4 Vehicle LED Market in China
- 2.7 LED Advertising
- 2.8 Street LED Lights Market

- **3 LED Industry and Policies**
- 3.1 Financial Subsidy in China
- 3.2 Official Organization of China Semiconductor Lighting Project
- 3.3 LED Development Plan of Shandong Province in china
- 3.4 China LED Import and Export
- 3.5 Global LED Industry

- **4 Manufacturers Analysis**
- 4.1 Everlight
- 4.2 Epistar
- 4.3 Genesis
- 4.4 Aocepi
- 4.5 Formosa
- 4.6 CREE
- 4.7 Bright
- 4.8 OSRAM
- 4.9 LITEON
- 4.10 CITIZEN
- 4.11 Tekcore
- 4.12 Toyoda Gosei
- 4.13 Nichia
- 4.14 UMILEDS (PHILIPS)
- 4.15 Dongbei
-

Selected Charts

- LED Crystal Grain Process Flow
- SMD LED Crystal Grain Process Flow
- LED Industry Chain
- Patent Cross of Main Global White LED Manufacturers
- Statistics and Forecast of Global LED Market Scale, 2005-2011
- Regional Structure of Global LED Market, 2005-2011
- Product Structure of Global High-brightness LED Market, 2006-2012
- Downstream Proportion of High-brightness LED According to Application, 2006-2011
- Statistics and Forecast of Quarterly Shipment and Downstream Application of Medium and Small-size Panel, 2007-2010
- Market Share Distribution of Global Major Medium and Small-size Panel Manufacturers, 2007
- Mobile Phone LED Market Scale, 2005-2011
- Shipment of Digital Photo Frame According to Size, 2007-2009
- Average Price and Shipment of Digital Photo Frame According, Jan-Jul, 2007
- Ratio of Laptop with LED Backlight Module, 2005-2010
- The List of Common LED Backlight Laptops
- Difference between LED Backlight Laptops and CCFL Laptops
- Cost Comparison of 42-inch LED Liquid Crystal TV and CCFL Liquid Crystal TV
- Overall Market Share of LED Liquid Crystal TV, 2005-2010
- Market Share Distribution of Main Global Vehicle Light Manufacturers, 2007
- Market Share Distribution of Main Global LED Crystal Grain Manufacturers, 2007

- Statistics and Forecast of Advertising LED Screen Market Scale in China, 2001-2009
- Global Street LED Lights Market Scale, 2007-2011
- Street LED Lights Industry Standard in China
- Statistics and Forecast of China's LED Export and Export Volume, 2004-2008
- Statistics and Forecast of China's LED Import and Import Value, 2004-2008
- Market Share Distribution of Main Global White LED Manufacturers, 2007
- Revenue and Operation Profit Margin of the company of Everlight, 2002-2010
- Everlight's Revenue Structure by Product, Q1 2008-Q4 2009
- Revenue and Operation Profit Margin of Epistar, 2000-2009
- Epistar's Revenue Structure by Product, Q1 2008-Q4 2009
- Epistar's HB LED Product Line
- Organizational Structure of Genesis
- Genesis's Revenue and Gross Profit Margin, 2003-2007
- Genesis's Quarterly Revenue, 2007-Jun, 2008
- Genesis's Gross Profit Margin, Operation Net Profit Margin, Pre-tax Net Profit Margin and Post-tax Net Profit Margin, 2005-Jun, 2008
- Aocepi's Revenue and Gross Profit Margin, 2002-2009
- Aocepi's Revenue Structure by Product, 2006-2009
- Organizational Structure of Formosa
- Formosa's Revenue and Operation Profit Margin, 2002-2009
- Formosa's Revenue Structure by Product, 2008
- Cree's Revenue and Operation Profit Margin, 2004-2008 FY
- Cree's Revenue Structure by Client, 2007
- Cree's Revenue Structure by Region, 2007
- Organizational Structure of Bright

- Bright's Revenue and Operation Profit Margin, 2002-2010
- Bright's Revenue Structure by Product, 2006-2009
- Bright's Revenue Structure by Region, 2006-2009
- OSRAM's Revenue by Division, 2007
- OSRAM's Revenue by Region, 2007
- Organization Structure of LITEON
- LITEON's Revenue by Product, 2007-2009
- Citizen's Revenue and Employee Number, 2003-2008
- Citizen's Revenue by Product, 2006-2008FY
- Citizen's Lighting LED Codes
- Organizational Structure of Tekcore
- Organizational Structure of Dongbei
- Dongbei's Revenue and Operation Profit Margin, 2002-2008
- Organizational Structure of Kingbright
- Kingbright's Revenue and Operation Profit Margin, 2003-2009
- Kingbright's Gross Profit Margin and Operation Profit Margin, 2006-Q1 2008
- Stanley's Revenue and Operation Profit Margin, 2003-2007FY
- Stanley's Revenue by Product, 2003-2007FY
- Stanley's Revenue by Region, 2003-2007FY
- Revenue and Gross Profit Margin of San'an, 2005-2010
- Seoul Semiconductor's Revenue and Operation Profit Margin, 2005-2009
- Seoul Semiconductor's Advantages
- Seoul Semiconductor's Product Plan
- Organization Structure of Lianchuang

- Organization Structure of HUGA
- HUGA's Revenue and Operation Profit Margin, 2003-2008
- Opto's Revenue and Gross Profit Margin, 2002-2009
- Tyntek's Revenue and Gross Profit Margin, 2003-2007
- AOT's Revenue and Gross Profit Margin, 2003-2007
- Sales Revenue of Top 21 Global Large, Medium-size and Small Panel Manufacturers, 2007
- Relationship among Key Global Vehicle Manufacturers and Vehicle Light Manufacturers
- Five-year and Ten-year Operation Expense of Street LED lights and HIP sodium Lights
- Rank of Global LED Downstream Manufacturers, 2007

How to Buy

Product details			How to Order
Single user	USD	File	By email: report@researchinchina.com
	3,000	PDF	By fax: 86-10-82600829
Enterprisewide	4,500	PDF	By online: www.researchinchina.com
Publication date: Oct. 2008			
For more information, call our office in Beijing, China: Tel: 86-10-82600828 Website: www.researchinchina.com			