

Global LED Industry Report, 2009



The global LED industry clusters in Japan, EU and Taiwan. Japan ranks first, followed by Taiwan. EU relies mainly upon Philips and OSRAM. In Japan, there are Nichia, Toshiba, Showa Denko KK, Sharp, CITIZEN and Toyoda Gosei, of which Nichia is specialized in LED. Besides, CREE is from the U.S.A.

Taiwan EPI Manufacturers, 2008-2009

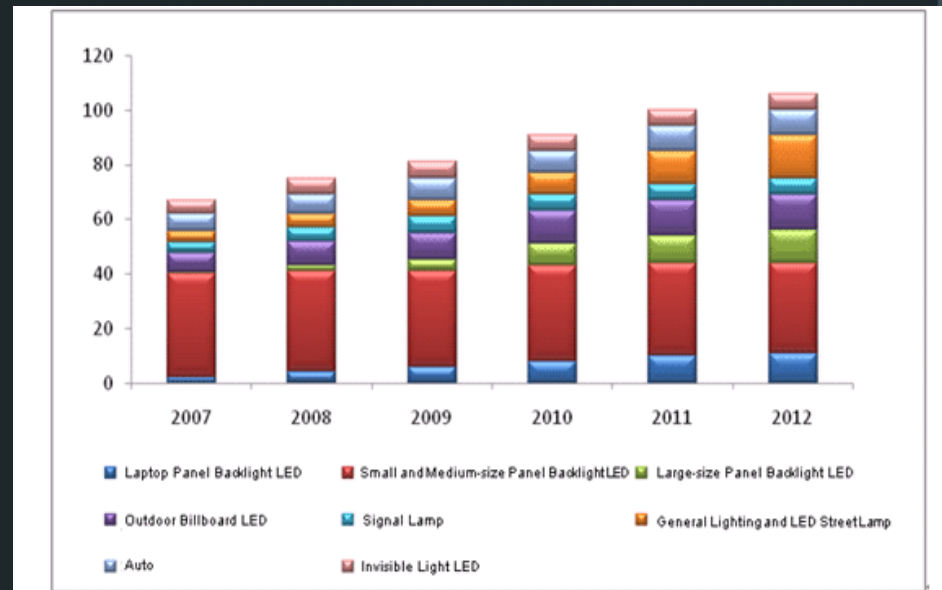
	Number of AlGaInP, 2008-2009	Number of InGaN, 2008-2009	AlGaInP Output Capacity, 2008-2009 (Million Dies)	InGaN Output Capacity, 2008-2009 (Million Dies)
Epistar	92	87	1600	1550
Formosa Epitaxy		27/34		550/650
Aocepi	25	15	1000	250
Genesis		24/28		400/500
Tekcore		24/26		400
HUGA	5/6	22/25	150/180	500/600
Opto	8			350
Lextar		2/6		50/150
Chi Mei	6/9	12/36	100/150	200/800
Other	19/29	40/52	300/400	400/450
Total 	155/169	253/309	2250/2430	4650/5700

Source: ResearchInChina

In mainland China, LED industry is dispersed, and thousands of LED manufacturers are mainly in the downstream to engage in LAMP packaging. The key packaging manufacturers consist of Xiamen Hualian, Foshan NationStar, Wenrun Optoelectronic, COTCO Luminant Device (Huizhou), Ningbo Hepu Optoelectronic, Jiangxi Lianchuang Optoelectronic, Tianjin Tianxing Electronic, Golden Valley Optoelectronics, Refond Optoelectronics, Ledman Optoelectronic, and Leadfull Optoelectronic, etc. In the meantime, there are the key manufacturers like San'an Photoelectric, Dalian Lumei, Silan Azure, Epiligh Technology and Rainbow in LED upstream industry.

The LED downstream market can be divided into three parts, TFT-LCD backlight, lighting and signal or data display, and TFT-LCD backlight is the most significant market. With the improvement of LED luminescence efficiency and cost reduction in 2009, LED has shown the great strength in large-size sector. In LED laptop field, the design of Dot typed light guide plate has replaced V-cut design, greatly reducing the cost.

LED Market Downstream Distribution and Market Size, 2007-2012E



Source: ResearchInChina

Table of Contents

- **1 LED Industry**
 - 1.1 LED Profile
 - 1.2 LED Terms
 - 1.3 LED Patents
 - 1.4 LED Process Flow
- **2 LED Market**
 - 2.1 Overview
 - 2.2 Small & Medium-size LED Market
 - 2.2.1 Cell Phone
 - 2.2.2 Digital Camera
 - 2.3 LED for Laptop Backlight
 - 2.3.1 Laptop Market
 - 2.3.2 Laptop Industry
 - 2.3.3 Profile of Laptop LED
 - 2.3.4 Laptop LED Market
 - 2.4 LED TV
 - 2.4.1 Development
 - 2.4.2 Classification
 - 2.4.3 Market
 - 2.5 LED Auto Lighting
 - 2.5.1 Introduction
 - 2.5.2 Status Quo
 - 2.5.3 Market
 - 2.6 Outdoor Billboard Market
 - 2.6.1 Global Outdoor LED Billboard Market
 - 2.6.2 China Outdoor LED Billboard Market
 - 2.6.3 Tulip Mega Media
 - 2.6.4 Olympic Games LED Project
 - 2.7 LED Street Lamps
 - 2.7.1 Cost Comparison between LED and Traditional Street Lamps
 - 2.7.2 Global LED Street Lamp Policies
 - 2.7.3 Global LED Street Lamp Market
 - 2.7.4 China LED Street Lamp Market
 - 2.7.5 Project of Promoting LED Lamps in Cities
 - 2.7.6 Plan of LED City
 - 2.8 General Lighting
 - 2.9 LED Traffic Lights

- **3 LED Industry Chain**

- 3.1 Overview
- 3.2 LED Upstream - Sapphire Substrate
- 3.3 LED Middle Stream- Epitaxy
- 3.4 LED Downstream – Packaging
- 3.5 China LED Industry

- **4 LED Manufacturers**

- 4.1 Everlight
- 4.2 Epistar
- 4.3 Genesis
- 4.4 Arima Optoelectronics
- 4.5 Formosa Epitaxy
- 4.6 Bright LED Electronics Corp.
- 4.7 Opto Tech
- 4.8 Harvatek
- 4.9 Tekcore
- 4.10 Unity Opto
- 4.11 HUGA
- 4.12 CREE
- 4.13 TOYOTA GOSEI
- 4.14 Nichia
- 4.15 OSRAM

- 4.16 Philips
- 4.17 Stanley
- 4.18 Seoul Semiconductor
- 4.19 Silan Azure
- 4.20 San'an Photoelectric
- 4.21 Lianchuang Optoelectronic
- 4.22 Fangda Group
- 4.23 Samsung Electro-Mechanics
- 4.24 LiteOn
- 4.25 CITIZEN
- 4.26 Dalian Lumei Optoelectronics
- 4.27 Epilight Technology
- 4.28 Rainbow Optoelectronics
- 4.29 HuaLei Optoelectronic

- **5 MOCVD Manufacturers**

- 5.1 AIXTRON
- 5.2 VEECO

Selected Charts

- Parameters of LED Wafer
- LED Classifications
- Distribution of LED Patents
- LED Production Flow Chart
- LED Market Downstream Layout and Market Scale, 2007-2012E
- Market Shares of Global Small and Medium-sized LCD Panel Manufacturers by Sum, 2008
- Market Shares of Global Small and Medium-sized LCD Panel Manufacturers by Shipment, 2008
- Global Shipment of Mobile Phone, Digital Camera, Hand-held GPS Navigation and PMP, 2008-2012E
- Global Mobile Phone Shipment and Ratio of Smart Phone, 2007-2012E
- Shipment of World's Top 13 Brand Manufacturers, 2007-2008
- LED Quantity Needed by Mobile Phone, 2006-2010E
- Digital Camera Shipment, 2004-2011E
- Market Shares of Global Key Digital Camera Manufacturers, 2008
- Digital Camera OEM Relation and Key Manufacturers' Shipment
- Market Shares of Digital Camera Display Suppliers by Sum, 2008
- Global Shipment of Notebooks, 2006-2012E
- Comparison between MID, Laptop and Netbook
- Market Shares of Global Key Laptop Manufacturers, 2001-2008Q3
- Netbook Shipment, 2007-2011E

- Shipment of World's Key Netbook Manufacturers, Q3 2008
- Taiwan Laptop OEM Shipment and Ratio to Global Market, 2004-2009
- Market Shares of Global Key Laptop OEMs, 2006
- Shipment of World's Key Laptop OEMs by Brand, 2007
- Market Shares of World's Key Laptop OEMs, 2008
- Cost Comparison between LED Backlight and CCFL Backlight
- Global Laptop LED Backlight Penetration Rate, 2007-2013E
- Market Shares of Global Key Lap LED Panel Manufacturers, 2009Q1
- LED TV Penetration Rate, 2008-2012
- Market Shares of Key LED TV Panel Manufacturers
- Power Consumption Comparison between Auto Signal LED Lamp and Incandescence Lamp
- Cost of Five Auto Lighting Types and Luminance Development Trend, 2007-2014E
- LED Auto Lighting Market Size, 2008-2015E
- Global Outdoor LED Billboard Market, 2007-2012E
- China Outdoor LED Billboard Market
- Industrial Chain of China Outdoor LED Billboard Market
- Main Partners of Tulip Mega Media
- Presence of Tulip Mega Media in China
- Global LED Street Lamp Policies
- Global Street Lamp Amount, 2008-2013E
- Global General LED Lighting Market Size, 2007-2012E
- LED Industry Chain
- Key Manufacturers in LED Industry Chain
- LED Sapphire Substrate Market Size, 2005-20102E
- Geographical Distribution of GaN LED Sapphire Substrate Downstream Market, 2008
- Machine Amount and Output Capacity of Epitaxy Manufacturers in Taiwan, 2008-2009
- Revenue of World's 17 LED Upstream Manufacturers, 2008-2009

- Operating Profit Margin of World's 10 LED Upstream Manufacturers, 2008-2009
- Revenue of World's 8 LED Downstream Manufacturers, 2008-2009
- Operating Profit Margin of World's 5 LED Downstream Manufacturers, 2008-2009
- Global LED Output Value by Region, 2006-2011E
- LED Ratio of China's LED Manufacturers
- MOCVD Machine Amount of LED Manufacturers in Mainland China, 2007
- Output Capacity of LED Manufacturers in Mainland, 2007
- Operation of Key Chinese LED Manufacturers
- Technology Sources of Chinese LED Manufacturers
- Revenue and Operating Profit Margin of Everlight, 2002-2010E
- Revenue of Everlight by Product, 2008Q1-2009Q4
- Everlight Product Structure by Application, 2005-2008
- Output Capacity of Everlight , 2008
- Revenue and Operating Profit Margin of Epistar, 2000-2009E
- Revenue of Epistar by Product, 2008Q1—2009Q4
- HB LED Product Line of Epistar
- Revenue and Operating Profit Margin of Genesis, 2003-2007
- Product Structure and Proportions of Genesis, 2005-2008
- Roadmap of Genesis
- Revenue and Gross Profit Margin of Arima Optoelectronics, 2002-2009
- Revenue of Arima Optoelectronics by Product, 2006-2009
- Revenue and Operating Profit Margin of Formosa Epitaxy, 2002-2009
- Revenue of Formosa Epitaxy by Product, 2008Q1-2009Q4
- Operating Revenues of Formosa Epitaxy, 2007-2009
- Operating Revenue Ratios of Formosa Epitaxy, 2009
- Revenue and Operating Profit Margin of Bright LED, 2002-2010E
- Revenue of Bright LED by Product, 2008-2009
- Revenue of Bright LED by Region, 2004-2008

- Financial Performance of Bright LED, 2008Q1-2009Q4
- Revenue and Gross Profit Margin of Opto Tech , 2004-2009E
- Revenue of Opto Tech by Product, 2008-2009
- Main Projects of Compul Electronics (Suzhou)
- Revenue and Operating Profit Margin of Harvatek, 2000-2009
- HARVATEK Revenue by Region, 2008
- Revenue and Gross Profit Margin of Tekcore, 2005-2010E
- High-Brightness LED Output Capacity of Tekcore, 2009Q1-2010Q4E
- Revenue and Operating Profit Margin of Unility Opto, 2004-2009
- HUGA Organization Structure
- Revenue and Operating Profit of HUGA, 2004-2008,
- Revenue and Operating Profit Margin of CREE, FY2004-FY2009
- Global Presence of CREE
- TOYOTA GOSEI Revenue by Product, FY2009
- TOYOTA GOSEI Revenue, FY2005-FY2009
- TOYOTA GOSEI Operating Profit, FY2005-FY2009
- TOYOTA GOSEI LED Product Revenue, FY2005-FY2009
- LED Revenue and Operating Profit Margin of Nichia, FY2004-FY2009
- Revenue and Operating Profit Margin of OSRAM, FY2004-FY2008
- OSRAM Revenue by Region, FY2008
- OSRAM Revenue by Product, FY2008
- OSRAM Employee Distribution by Region, FY2008
- Financial Statement of OSRAM, 2004-2007
- Revenue of Philips Lighting by Region, 2004-2008

- Operating Revenue of Philips Lighting, 2004-2008
- Revenue of Philips Lighting by Product, FY2008
- Financial Data of Philips Automotive Lighting Hubei Co., Ltd, 2004-2007
- Revenue and Operating Profit Margin of STANLEY, FY2004-FY2009
- Revenue and Operating Profit Margin of STANLEY's Auto Lighting Division, FY2005-FY2009
- Revenue and Operating Profit Margin of STANLEY's Electronics Lighting Division, FY2005-FY2009
- STANLEY Revenue by Region, FY2008-FY2009
- STANLEY Operation Profit by Region, FY2008-FY2009
- Financial Data of STANLEY (Tianjin), 2004-2007
- Financial Data of STANLEY (Guangzhou), 2004-2007
- Financial Data of STANLEY (Shenzhen), 2004-2007
- Financial Data of STANLEY (Suzhou), 2004-2007
- Core Competitiveness of Seoul Semiconductor
- Seoul Semiconductor's Code of Conduct
- Product Distribution of Seoul Semiconductor
- Revenue and Operation Profit Margin of Seoul Semiconductor, 2006-2009
- Revenue and Operation Profit of Seoul Semiconductor, 2007Q1-2009Q1
- Direct Export Growth Margin of Seoul Semiconductor , 2002-2009Q1
- Global Presence of Seoul Semiconductor
- Vertical Integration of Seoul Semiconductor
- Downstream Application Distribution of Seoul Semiconductor, 1999, 2002, 2005, 2008 & 2009
- Product Structure of Seoul Semiconductor , 2007Q1-2011Q4
- Revenue and Operation Profit Margin of San'an Photoelectric, 2005-2010
- MOCVD Machine Number of San'an Photoelectric
- GaN Epitaxy Cost Structure of San'an Photoelectric

- GaAs Epitaxy Cost Structure of San'an Photoelectric
- Product Downstream Application of San'an Photoelectric
- Output Capacity Schedule of San'an Photoelectric, 2008-2011
- Revenue Structure of Samsung Electro-Mechanics, 2009Q1
- LED Operation Revenue of Samsung Electro-Mechanics by Application, 2005-2009
- CITIZEN Revenue, FY2004-FY2008
- CITIZEN Operation Profit, FY2004-FY2008
- CITIZEN Revenue Structure, FY2008
- CITIZEN LED Revenue, FY2004-FY2008
- AXT Revenue and Operation Profit Margin, 2004-2008
- AXT Revenue by Product, 2006-2008
- AXT Revenue by Region, 2006-2008
- AIXTRON Revenue, 2003-2008
- AIXTRON Net Profit, 2003-2008
- AIXTRON Operation Profit, 2003-2008
- Global Presence of AIXTRON
- Staff Members of AXITRON, 2003-2008
- Product Downstream Application of AXITRON, 2008
- AXITRON Revenue by Region, 2008
- AXITRON Product Revenue by Technology, 2008
- Market Shares of AXITRON, 2006-2008
- VEECO Revenue and Operation Profit, 2004-2008
- VEECO Revenue by Product, 2006-2008
- VEECO Revenue by Product, 2009Q1

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