Global and China Small and Medium-sized Display Device Industry Report, 2010-2011

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This report

- **Analyzes the status quo and future of small & medium-sized panel industry.**
- **Focuses on the industries related to small & medium-sized panels.**
- **Highlights the operation of small & medium-sized display devices manufacturers.**

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Abstract

The small & medium-sized display devices refer to the ones sized below 11 inches. Along with the massive operation of high-generation TFT-LCD production lines, the original manufacturers specialized in large-sized G3-G5.5 lines have been markedly inferior to those of G6 G10 TFT-LCD production lines; in consequence, they have successively transferred into the fabrication of small & medium-sized display devices, which initiated the oversupply, particularly in the medium-sized field (5-11 inches) whose price plunged.

The output value of small & medium-sized display devices dropped in 2006 and the market underwent changes.

Firstly, mobile phone display features even larger sizes as the smart phone flourishes. The display size of mainstream smart phone reaches 3.5 inches, and that of the high-end one rests on 4.3 inches which is the double of that of common mobile phone. The resolution also becomes higher, with the mainstream one of 800*480 or 800*854, and the high-end one of 960*640, a quadruple of the common mobile phone. The ASP of mobile phone display has been on the rise from the ever falling status. It turned out to be US$8.06 in 2010, up 11.8% against 2009, and promisingly, it will maintain the growth momentum by 2013.

Secondly, the medium-sized display market thrives. As the netbook was massively rolled out into the market in 2009, the small & medium-sized display industry still achieved growth against the economic crisis. And in 2010, the large shipment of tablet PC fueled the growth of medium-sized display market.

The small & medium-sized display industry experienced sharp fluctuations in 2010. CPT and HANNSTAR were completely transformed into the manufacturers of small & medium-sized display devices. The shipment of CPT in 2010 was as high as 352 million, up 135% from 2009; and that of HANNSTAR registered 248 million, up 505% against 2009. However, subject to the not high average unit price and the low gross profit despite the booming shipment, as well as the high depreciation of TFT-LCD production line, both of the manufacturers were suffering from loss.

SMD has been engaged in OLED for years, and it ultimately made significant breakthrough in 2010. By virtue of the fully depreciated G4.5 LTPS TFT-LCD production line, the OLED shipment of SMD greatly expanded. Samsung, Nokia, HTC, and Lenovo massively employed OLED as mobile phone display. In 2010, the output value of OLED industry rose 92% from 2009, of which SMD contributed more than 95%. In 2011, SMD will excel Sharp by means of OLED and blossom into the world's largest manufacturer of small & medium-sized display.

In H2 2010, due to the deficient capacity of LG Display, Apple iPhone increased its display suppliers Sharp and TMD. Sharp originally provided display devices for Apple except iPhone and iPad. Benefiting from the long-term orders and the fabulous cash support of Apple, Sharp reopened the three production lines (closed at the end of 2008 because of the economic downturn) of small & medium-sized display devices of TENRI and MIE.

In late 2010, Hon Hai intended to purchase ? 50% equities of Hitachi Display for JPY100 billion, but the negotiation failed.

In early 2011, Sony Mobile Display sold its subsidiary-STMD to Kyocera; meanwhile, Sony acquired the G4 line of EID, and purchased the back-end module fab of Epson in Suzhou for RMB780 million.

Epson, the global largest manufacturer of small & medium-sized display in 2004 and 2005, has witnessed the declined performance during the recent years, and it is probable to retreat from the field ultimately.

Revenue of Global Major Small & Medium-sized Panel Manufacturers, 2007-2010 (US$ mln)

	2007	2008	2009	2010
TMD	2485	2182	2167	2373
HANNSTAR	20	108	630	730
CPT	556	515	322	700
CMI INNOLUX			1772	2609
GIANTPLUS	397	165	372	392
AUO	1264	1383	1252	1352
WINTEK	998	405	581	598
TRULY	928	810	840	893
TIANMA	246	197	317	510
SMD	2500	2345	2840	3847
EID	1915	1452	910	684
LGD	458	410	646	1281
VARITRONIX	374	345	208	283
SHARP	3272	3876	3090	4068
HITACHI DISPLAY	1150	1020	960	850
SONY MOBILE DISPLAY			495	528
PVI	353	369	487	775

Source: ResearchInChina

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