Global and China Touch Panel Industry Report, 2010-2011

June 2011

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This report

- **Analyzes the downstream market of touch screen**
- **Focuses on touch screen vendors and glass manufacturers**
- **Highlights Touch Panel IC**

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Abstract

The touch panel industry has presented the polarization after the explosion in 2010, the revenue of the large manufacturers has increased rapidly, while that of the small ones has risen by slight margin and even declined. TPK and Wintek have dominated the high-end sector of the industry and enjoyed the lion's share by virtue of technical and client edges. The touch panel market remains booming in 2011, but it is difficult for the small & medium-sized manufacturers to make profits. In 2010 when the market thrived, a lot of enterprises expanded their capacities, which resulted in the fierce price competition of both resistive touch screen and capacitive touch screen.

TPK and Wintek are still the exclusive suppliers of Apple, yet Wintek gets increasingly marginalized, especially in large-sized iPad touch screen sector. Apple offers more orders to TPK who boasts higher yield than Wintek. Although Hon Hai, the parent company of CHIMEI INNOLUX, is the major OEM of Apple, merely the touch sensor of CHIMEI INNOLUX was approved by Apple in April.

CHIMEI INNOLUX can only ship the touch sensor to TPK who makes the shipment of final products together with Wintek. TPK is most competitive in touch screen and LCD panel as well as the mounting yield of cover glass, which brings along the higher revenue that includes the sales from LCD panels.

Ranking of Global Top 14 Touch Panel Manufacturers by Revenue, 2010-2011(Unit: US$ mln)

Manufacturer	Region	2010	2011	Remark
TPK	Taiwan	1886	4354	
Wintek	Taiwan	2022	3150	(including the revenue from non touch screen business)
CHIMEI INNOLUX	Taiwan	810	1507	(merely the revenue from touch screen business)
NISSHA	Japan	575	624	
Young Fast	Taiwan	550	601	
Cando	Taiwan	141	447	Touch Sensor (including the revenue from non touch screen business)
ELO	USA	389	420	Large-sized touch screen above 15 inches
MELFAS	South Korea	214	318	
SMAC	South Korea	174	311	(including the revenue from non touch screen business)
ELK	South Korea	193	293	
Sintek	Taiwan	193	290	Touch Sensor (including the revenue from non touch screen business)
JTOUCH	Taiwan	184	260	
EELY	Taiwan	160	200	
Swenc	Taiwan	74	70	

In 2011, the single-plate touch glass solution, also known as Touch on Lens or One Glass Solution, becomes the hot topic of touch screen industry. The touch control module of the solution has reduced a layer of ITO coating and a piece of glass mounting and directly embedded the touch control sensor into the single-plate glass layer, which will greatly reduce the cost and perform better in production speed and yield.

Wintek, being severely beaten by TPK, takes the lead in the mass-production of Touch on Lens. It introduced the technology into such models as Wildfire and CHACHA of HTC in Q2 2011, with the monthly average output of 500K~600K pieces and still on the rise. In addition, Samsung Electronics will employ such product design in Q3.

Touch on Lens has to deal with the following problems in the future. First of all, the strong interference might lead to the breakdown of the lowest-layer LCM and a layer of SIO_2 needs to be plated, which will increase the cost and the procedures. Secondly, the inferior strength fails to meet the rising requirements of increasingly large-sized display based mobile phones, particularly the smart phones. Thirdly, color filter manufacturers are better at integrating touch sensor and cover glass than the traditional touch screen manufacturers. Fourthly, mother cover glass has to undergo CNC cutting after the surface mounting of touch sensor and then be mounted with LCM, the yield is hence relatively low and the cost will expand. Finally, the rare supporting control IC must pay special attention to interference.

Only the joint promotion of Wintek, TPK, Young Fast, and Nissha can the market be opened for Touch on Lens. Nevertheless, Touch on Lens clearly represents the general trend, yet with slow progress. Promisingly, it will approximate 25% of capacitive touch screen at the end of 2012 and 60% at the end of 2014.

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