Global and China Display Driver IC Industry Report, 2011-2012

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include the Ministry of Industry and Information Technology of the People's Republic of China, National Bureau of Statistics of China and China Customs etc.

Abstract

The report highlights the followings:

- Brief introduction to display driver IC;
- Display driver IC market;
- Small-and medium-sized panel market of display driver IC;
- Research of 9 leading display driver IC design houses, 7 major small-and medium-sized panel players, and 4 display driver IC upstream companies;

Display driver IC can find application in large-sized panel and small-and medium-sized panel. Display driver IC for large-sized panel use is grouped into source driver IC and gate driver IC, while display driver IC for small-and medium-sized panel use is likely to grow into a system-on-a-chip that will, in function, further integrates TCON and high-speed interface to simplify the external FPC and the design of PCB. Given the power-saving concerns, the integration of backlight control function will become another trend.

In 2011, the global display driver IC market scale hit USD6.158 billion, and the figure in 2012 is expected to drop to USD6.102 billion and, in 2014, it will dive to USD5.478 billion. The fall of market size is caused as follows:

- Insufficient demand for large-sized LCD display and LCD-TV; the consumption of driver IC dropped due to the heightened integration of driver IC;
- large-sized panel manufacturers integrate functions of gate driver IC into a panel;
- The manufacturing process of driver IC improves. For instance, more and more driver IC is fabricated in 12-inch wafer fabs instead of originally 8-inch ones and with the fabrication process evolving from 0.18 micrometer to 0.13 and 0.09 micrometer. As a result, the driver IC cost will be greatly slashed, making the selling price cut down.

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Ranking of Global Major Display Driver IC Manufacturers by Revenue, 2010-2012 (USD mln)

	2010	2011	2012E
Samsung	970	1,079	980
Novatek	957	1,035	1,038
Renesas	857	642	580
Himax	591	553	713
Magnachip	308	340	332
Lusem	330	280	220
Panasonic	391	154	130
Raydium	261	270	280
Sharp	235	114	80
Toshiba	282	258	208
Ilitek	184	308	385
Orise Tech	176	141	140
Sitronix	169	155	160

Source：RIC <Global and China Display Driver IC Industry Report, 2011-2012>

For Samsung, the revenue from driver IC business saw a decline on account of the fact that it was the first to employ GOA technology that integrate gate driver IC based on Array. And Samsung's driver IC for OLED are more often supplied by Magnachip than ever.

For Novatek, the Taiwan-based company became the world's largest driver IC manufacturer in 2012, while its major contributor to the revenue is from large-sized panel driver IC business.

Renesas announced in January 2012 to retreat from large-sized driver IC sector and to only retain small-and medium-sized driver IC business, the market occupancy of which comes top worldwide. Renesas has become the monopolist in the high-resolution small-and medium-sized panel driver IC market as the exclusive supplier of Apple for series products such as iPhone, iPad, iPhone 5, and iPad Mini.

In the display driver IC field prior to the year 2009, Japanese and South Korean businesses took dominant position. But since 2009, Japanese companies began to stay out of the market because they were not in the position to compete with Taiwanese counterparts in terms of price, especially, they were no presence in large-sized driver IC market. The rise of Taiwanese players lies in Taiwan's most perfect supply chain. The upstream of driver IC cover foundry, gold bump and package (COG, COF, and TCP). Taiwan boasts the world's sole 12-inch display driver IC wafer fab. Moreover, the world's only two independent gold bump manufacturers are located in Taiwan.

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