Global and China LCD Backlight Unit (BLU) 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

Global and China LCD Backlight Unit (BLU) Industry Report, 2011 2012 covers the followings:

- Introduction to LCD Backlight Unit
- LCD Backlight Unit Market
- LCD Panel Market
- 11 Major LCD Panel Players
- 12 Major LCD Backlight Unit Enterprises
- 4 Manufacturers of LED Chips for LCD-TV

In 2012, the LCD backlight unit market size approximated UR$15.5 billion, down 3.1% from US$16 billion (a YoY decline of 4.2% over 2010) in 2011. The continuous decline mainly resulted from the sharp fall in the price of LED chips, the key raw materials for backlight unit. Meanwhile, due to the insufficient demand for TVs, it is expected that in 2012, the global LCD TV market size will be 216 million units, with a growth rate of merely 2.85%.

Revenue of Global Top Backlight Unit Enterprises, 2010-2012 (US$M)

	2010	2011	2012E
Radiant	1,527	2,158	2,651
Coretronic	1,891	1,648	1,472
Hansol Technics	1,373	804	529
Taesan	1,085	838	1,094
DID	494	677	598
DSLCD	1,247	778	537
Forward	229	171	130
Forhouse	685	703	765
Heesung Electronics	1,312	1,157	1,120
Chi Lin Optoelectronics	600	611	644
New Optics	587	632	539
Kenmos	306	231	208

Source: RIC < Global and China LCD Backlight Unit (BLU) Industry Report, 2011-2012>

For backlight unit enterprises, the light guide plate (LGP) technology acts as the core. As backlight unit exerts great effect on the performance of LCD panel, LCD panel companies have all held or participated in backlight unit enterprises, which are usually supposed to have one client of the LCD panel, e.g. Heesung Electronics and New Optics are suppliers merely to LG Display; Hansol, DID, DSLCD and TAESAN supply Samsung alone. There are only three independent large-scale backlight unit enterprises worldwide, namely, Coretronic, Radiant and Kenmos.

In recent years, the share held by Korean enterprises has continued to decline with poorer ability to control cost and they need to purchase LGP from the Taiwanese counterparts with more advanced LGP technology. Taiwanese players like Radiant obtained 70% of the total revenue from Korea, but in 2008, this figure slumped to 34%.

For the backlight unit industry, the Open-cell and Hinge-Up which made their debut in 2011 are not only great opportunities but challenges. Hinge-Up chiefly caters to the ultra-thin Ultrabook, backlight unit enterprises need to place the front cover of Ultrabook and LCM into one module, i.e. Module In Backlight (MIB), and both LCM process and the front cover of Ultrabook should be completed. This is difficult for backlight unit manufacturers to do the job, and globally, only Radiant is competent for it, which secures its significant growth in revenue (more than 40% and 20% in 2011 and 2012, respectively) against the overall decline of the backlight unit industry.

Open-Cell can also be used in ultra-thin LCD-TVs and table PCs. For more thinness, backlight unit enterprises must conduct shipment via LCM, so as to be 1-2 mm thinner than traditional means. Enterprises capable to grow in 2012 all have been provided with LCM assembly capacity.

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The LCD panel industry in Mainland China has seen rocket growth in 2012, accompanied by significant rise in shipments of CSOT and BOE G8.5 generation lines, but the supporting backlight units come from South Korean and Taiwanese enterprises, of which, CSOT mainly cooperates with Coretronic Corporation; and major suppliers of BOE include Japan-based Chatani, South Korea-based On-Nuri and Nanohitec.

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