Global and China OLED Industry Report, 2012

Jan. 2013

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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 Company Reports, and National Bureau of Statistics of China etc.

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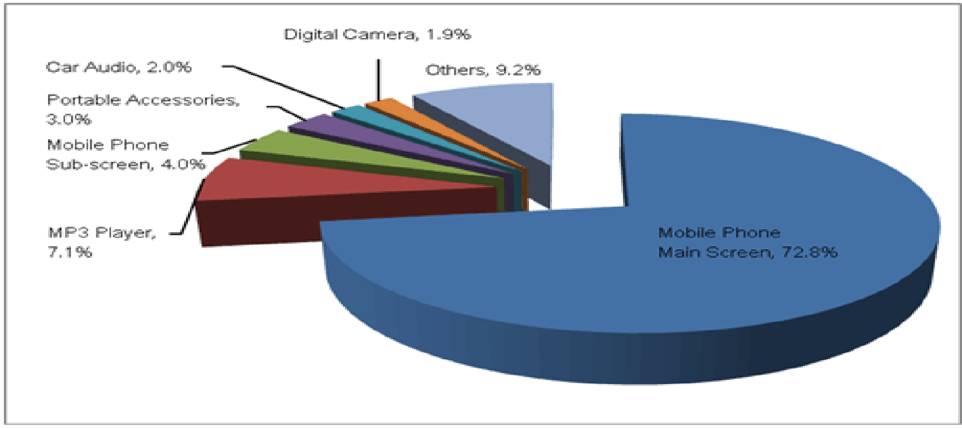
Abstract

Promoted by the display giants headed by Samsung and LG, OLED industry is still in the stage of steady development. In 2011, the OLED output value worldwide approximated USD3.3 billion, with year-on-year growth above 200%. The figure is expected to reach USD6.7 billion in 2012, rising by 102% from a year earlier. From the perspective of shipment, the shipment of OLED display panels around the globe reached 190 million pieces in 2012, with share in medium and small-sized display screens climbing up to 8.4%.

Medium and small-sized screens, which monopolize the OLED display market, are mainly applied in mobile phones, MP3 players, car audios, digital cameras, etc., and the application in smart phones makes the penetration rate of AMOLED in medium and small-sized panels increase rapidly. The shipment of OLED screens for mobile phones around the globe registered 23 million pieces in 2009, and climbed up to 112 million pieces in 2011.

OLED can be divided into AMOLED and PMOLED. From the perspective of application category, over 60% of PMOLED are applied in mobile phone sub-screens, and 10% or so are applied in MP3 players. PMOLED will witness decline in future along with the market contraction of MP3 player and mobile phone sub-screen. In respect to PMOLED, the application of AMOLED is wider, and the proportion contributed by mobile phone applications approximates 80%. Besides, AMOLED is also applied in digital cameras, car audios and other multimedia players. Along with the promotion of SMD and LG, AMOLED will compete with TFT LCD in the arena of large-sized applications as FPTV and laptop, and its application scope will be wider in future.

OLED Application Structure around the Globe, 2012



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At present, Samsung takes the lead in the development of OLED technologies around the globe. Samsung has invested USD4 billion on OLED just in 2012. In April 2012, Samsung invested USD6.5 billion to set up Samsung Display, so as to accelerate the development progress of OLED. In order to transcend Samsung, LG (another OLED enterprise in South Korea) plans to slow down the small-sized AMOLED capacity of existing 3rd generation and 4.5 generation plants, and specialize in the mass production of large-sized AMOLED products.

As the enterprise with prime development of OLED in Japan, Sony fails to achieve breakthrough in arena of OLED TV. In order to strengthen the share in medium and small-sized panel market and accelerate the development in arena of OLED, Sony, Toshiba and Hitachi merged their medium and small-sized display business in 2011, and set up a new company – Japan display. Since the new company integrates the technical strengths of Sony, Hitachi and Toshiba and gets support from the Investment Fund predominated by Japanese government, it embraces huge development potential.

Global and China OLED Industry Report, 2012 mainly includes the following contents:

- Production processes and major technologies of OLED;
- Output value, shipment, capacity, downstream application and prediction of OLED around the globe;
- Development status and prospect of OLED in major countries worldwide;
- Development situation and forecast of medium and small-sized display market around the globe;
- Development situation of major OLED manufacturers globally;
- Development situation of OLED peripheral manufacturers.

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