Global and China Touch Screen (Panel) Industry Report, 2012-2013

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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

Global and China Touch Screen (Panel) Industry Report, 2012-2013 covers the followings:

Touch Screen Market Size
Trends of Small, Medium and Large-sized Touch Screens
Touch Screen Downstream Market and Industry
11 Small and Medium-sized Display Companies
18 Touch Screen Companies
4 Touch IC Companies and 5 Glass Companies

Touch screen market scaled approximately US$13.8 billion in 2012, an increase of 27.8% compared with US$10.8 billion in 2011, shipments grew by about 34.1%. It is expected that the market size in 2013 will climb 26.8% YoY to US$17.5 billion, with growth of 28.0% in shipments.

The future development direction of the mobile phone touch screen area is IN-CELL, which, once the yield problem is solved, will produce the lowest cost as well as the best performance. While Samsung insists on using AMOLED, ON-CELL will enjoy a long-term retention of place. Apple has pioneered the G/G-type touch screen with the best performance, but too thick, too heavy, too costly. In 2011, Samsung's challenge to Apple was not so significant, G/G type became Apple's favorite, and also the mainstream choice of high-end mobile phones. The abrupt rise of G/F/F in 2012 brought more ideal thickness, weight and cost than G/G type, yet the performance was not good enough. P/F type dominated the low-end since cost was the most important consideration. In 2012, G/F/F eroded part of the P/F market, P/G type suffered a fast fading due to poor weight and thickness as well as higher cost than P/F.

Entering 2013, with the high homogenization of smart phones, companies have concentrated on screen competition, resulting in the endless emergence of 1080P phones. A 5-inch phone screen's resolution is even higher than 99% of 32-inch TV, the same as 90% of 60-inch TV, which reflects the public's enthusiasm for screens. Even for cheap phones, only more costs are devoted to the screen can good results be achieved, the year 2013 will witness the rise of OGS full lamination. High- and medium-end phones, especially smart phones will resort to extensive use, and most companies don't care about the shortcomings of insufficient structural strength. Nokia, Sony Mobile and HTC all use OGS in their high-end products, so do Mainland Chinese companies such as OPPO, Huawei, ZTE, Coolpad, Lenovo, K-TOUCH, Gionee, BBK, etc., accompanied by a speedy spread in the mid-market.

The cost advantage of G/F/F is not prominent, and users show unconcern about the shortcomings of insufficient structural strength, thus a large portion of G/F/F's share in the high/medium-end market will be snatched by OGS. The future development of G1F depends on the price advantage, following the IC technological advances and lower prices, its cost advantage may even be greater than that of resistive screen.

The medium-sized field primarily refers to the 7-10 inch screen market. In 2011, iPad adopted G/G type touch screen, so did Amazon's Kindle Fire; as the medium-sized G/G type touch screen capacity was basically undertaken by Apple, other vendors turned their attention to the G/F/F. In 2012, Japan-based Nissha Printing with the aid of Nitto Denko's ultra-thin ITO film developed DITO type touch sensor. Considering the thin design and better performance than G/F/F, Apple employed GF2 in iPad Mini for the first time. The cost performance of 9.7-inch iPad launched in 2013 is obviously inferior to the upcoming iPad Retina Mini, the sales volume is expected to drop severely.

GF2 will see a swelling proportion, however, due to the high cost, it is unlikely to be adopted by vendors other than Apple. Most of the vendors of non-Apple camp will choose G/F/F, and Amazon is also probably to turn to the G/F/F camp after abandoning the G/G type. OGS in 2014 is anticipated to have a high yield of about 90%, with competitive cost and adequate capacity, thus widely used in the non-Apple camp, followed by a further market expansion in 2015.

It is predicted that OGS will dominate the 11-inch above touch screen market, yet a few vendors prefer to the G/F/F design in view of cost factor. The bigger the screen, the more evident the competitiveness of OGS, because as screen increases, the resistance value accordingly presents an escalating trend, but in the case of large resistance, ITO film sensor exposes poor sensitivity and high degree of difficulty to produce the large-sized ones. Thickness and weight of G/F/F are also higher than those of OGS, 11.5-17 inch laptops are highly possible to select OGS.

Revenue of Leading Touch Screen Companies, 2010-2013

	2010	2011	2012	2013E
TPK	2,046	4,736	5,863	7,748
WINTEK	1,417	2,754	3,508	3,057
NISSHA PRINTING	579	322	506	690
ELK	203	212	155	180
MELFAS	201	171	188	290
ILJIN DISPLAY	96	293	520	720
SMAC	175	425	398	530
JTOUCH	176	245	154	203
YOUNG FAST	554	561	443	528
O-FILM	39	130	542	629
DIGITECH SYSTEMS	101	102	208	280
LG DISPLAY	1,281	1,518	1,862	2,088
JAPAN DISPLAY			820	1,360

Unit: US$M

Source: RIC, *Global and China Touch Screen (Panel) Industry Report, 2012-2013*

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