



Global and China Touch Screen Control IC Industry Report, 2012-2013

Nov. 2013

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.

Abstract

The report covers the followings:

1. Introduction to touch screen
2. Touch screen market
3. Touch screen control IC market
4. 13 touch screen control IC design companies and eight major touch screen vendors

Though the unit price is low, touch screen control IC goes through the entire industrial chain, involving with touch screen vendors, ITO film vendors, mobile phone design houses, LCD suppliers, mobile phone CPU providers, mobile phone human computer interface design companies and mobile phone vendors. Any error in any link will affect the customer experience. Mobile phone touch screen control IC is usually tagged with the unit price of USD0.5-0.7, so this is a small-scale industry with high technical threshold.

Touch screen control IC enterprises must keep up with the development direction of touch screens closely, otherwise deviation means the worrying prospect. In 2014, In-Cell will enter the prosperous period.

※ First, Apple still insists on using the In-Cell technology for iPhone 5S,

proving the progress of the In-Cell technology of Japan Display, LGDISPLAY and Sharp and the improved yield.

※ Second, the Chinese mainland's high-end models, such as Huawei P2 and Xiaomi 3, begin to adopt In-Cell technology which is not occupied by Apple exclusively or out of reach any longer.

With the gradual increase in output, the cost advantage of In-Cell technology will stand out soon. The adding of touch function to In-Cell only needs the cost of less than USD0.1, while the single OGS lamination process requires the cost of USD1. Meanwhile, more and more IC vendors like to support In-Cell, such as the initial Synaptic, the current FocalTech Systems Limited (a touch IC giant in Mainland China), and Renesas (which integrates driver IC and touch IC in a same chip).

The touch screen control IC market value reached USD1,558 million in 2012, and will hit USD1,832 million with the growth rate of 17.9% in 2013. In the wake of the wide application in laptops, the market value will jump by 18.3% to USD2,168 million in 2014.

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In the laptop-use touch screen market where intense competition exists, OGS acts as a giant in technology, TPK's monopoly is broken, GFF and Metal Mesh technologies are developing rapidly, and TFT-LCD panel vendors are developing embedded touch screens. As the price of laptop-use touch screens declines dramatically, the competition becomes fiercer and the profit drops substantially. In late September, Mutto announced its withdrawal from the touch screen field.

The price of one 14-inch OGS panel is expected to decrease from USD50 to USD30, touching USD20 in 2014 and USD15 in 2015. Touch screens will become standard configuration of laptops eventually just like LED. This is the main driving force of the touch screen control IC market.

Although there are numerous companies in Chinese mobile phone touch screen control IC market, the top three companies Focal Tech, Goodix and Morningstar occupy more than 70% share. Three of them are backed up by foundries, Focal Tech by TSMC, Goodix by UMC and Morningstar by Global Foundries. Furthermore, Focal Tech also enjoys

investment from Intel, Goodix's 30% share is held in the hand of MediaTek and Morningstar has been acquired by MediaTek. EETI is also supported by Intel. Chinese local enterprises nearly grasp no upstream resource, so they are unable to compete with Taiwanese counterparts.

Revenue (only including Touch Controller IC Business Revenue) of Touch Controller IC Design House, 2012-2013 (USD mln)

	2012	2013E
Melfas	163	170
FocalTech	159	202
Goodix	90	130
Mstar	70	102
Elan	134	208
Synaptics	274	432
Cypress	180	130
Atmel	198	170
Others	202	230
Total	1558	1832

Source : reachinchina

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1. Overview of Touch Screen

- 1.1 Glass-to-glass (G/G)
- 1.2 Glass-to-film-to-film (G/F/F)
- 1.3 G1F
- 1.4 TOC
- 1.5 ON-CELL
- 1.6 IN-CELL
- 1.7 Development Trend of Mobile Phone Touch Screen Technology
- 1.8 Touch Screen Market

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- 2.6 Touch Control IC Industry
- 2.7 Product Analysis of Major Touch Control IC Vendors
- 2.8 Rankings in Touch Screen Industry

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- 3.3 Notebook PC Industry
- 3.4 Tablet PC Industry
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- 4.2 Wintek
- 4.3 ILJIN Display
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- 4.5 SMAC
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- GLASS-TO-GLASS (G/G) Projective Capacitive Touch Screen
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