



Global and China Display Driver and Touch IC Industry Report, 2013-2014

Apr. 2014

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

Global and China Display Driver & Touch IC Industry Report, 2013-2014 involves the followings:

1. Introduction to Display Driver IC and Touch IC
2. Technology Trends of Small-, Medium- and Large-sized Touch screens
3. Status Quo and Trend of Metal Mesh and AgNW
4. Analysis on Display Downstream Market
5. Analysis on Display Driver IC Market and Industry
6. Analysis on Touch IC Market and Industry
7. 11 Driver IC Design Houses
8. 10 Touch IC Design Houses

In 2013, global display driver IC market size skyrocketed by 10.7% to USD 6.882 billion, and is expected to be worth USD 7.278 billion in 2014, with an increase of 5.6%. The rise in the display driver IC market scale can be attributed to the factors below:

- ✘ Market acceptance of 4K2K UHD-TV exceeded expectations and it is expected that market size will expand rapidly.
- ✘ Resolution of screens on mobile phones and tablet PCs improved significantly, and there will be at least 30 million mobile phones with QHD (Quad High Definition, 2560*1440) screens to be shipped in 2014, including blockbuster Samsung S5, G3 from LG, Lumia 1820 from Nokia, and Find7 from OPPO.
- ✘ Resolution of computer display and notebook computer screen also improved substantially, and the number of Driver IC increased greatly.

Revenue of Major Global Driver IC Vendors, 2010-2013 (Unit: USD mln)

	2010	2011	2012	2013
Renesas	857	642	632	720
Novatek	957	1,035	1,044	1,140
Himax	591	553	634	645
Ilitek	184	308	356	323
Raydium	261	270	356	365
Orise Tech	176	141	138	314
Silicon Works	215	275	331	296
Sitronix	169	155	175	212
Magnachip	308	340	303	286
Rohm	310	190	169	178
Samsung	970	1,079	1,141	1,380
Sharp	235	114	160	230
Toshiba	282	258	208	169
Pnaasonic	391	154	120	130
Lusem			277	350
Source: ResearchInChina				

The most noteworthy in Driver IC industry in 2014 is the sale of Display Driver IC unit by Renesas. Since its inception, Renesas has operated in the red. In order to dig its way out of losses, the company sold some non-core assets, while its medium and small-sized Display Driver IC unit is fairly profitable. Renesas is a principal supplier of driver IC for Apple phones, but its main business comes to MCU. Broadcom, Synaptics and Novatek will be the most likely buyers. Especially, Synaptics, a leading company in touch IC market, would become a dual leader in medium and small-sized Display Driver IC and Touch IC markets, if its bid for Renesas succeeded.

For its future trend, the touch IC of mobile phone is to be integrated mainly driven by cost and technology. Technically, it can be integrated with either Driver IC or AP, with the former being expected to be the mainstream. In addition to cost cuts, On-cell/In-cell technology is more suitable for integrating Driver IC and Touch IC. As parts of LCD display module, Driver IC and Touch IC can be completely independent of AP. It is expected that TDDI (Touch Display Driver IC) will start to be shipped progressively from the second half of 2014. Another trend in Touch IC field is In-cell and On-cell. In the past, On-cell was mainly expensive and noble AMOLED panel. However, from the year 2014, we will see a-Si LCD mobile phone panel equipped with On-cell Touch to be shipped from Taiwanese and Chinese companies, including AUO, Innolux, CPT, Hannstar, BOE and Tianma, etc. It is expected that 5%-10% of China's mobile phone industry will be provided with On-cell Touch LCD. Several IC tycoons are producing On-cell Touch IC, among which Synaptics releases its production at the fastest pace, followed by FocalTech.

In Touch IC market, as mid- to lower range mobile phones have no interest in multi-point touchscreen, the mainstream market is still dominated by self capacitance Touch IC, which has a relatively low entry barrier and is faced with fierce price war. Relying on its advantages in supply chain, Taiwanese players can achieve the lowest costs, forcing mainland peers out of the market, but do not make handsome profit. In 2013, Touch IC market size edged up only 7.4%, and its growth rate will continue to slow in the future. The driving force of the market is in Touch IC field of In-cell/On-cell. Although its market is large, the low- and medium-end market generates meager profits.

1. Profile of Driver IC

- 1.1 Introduction to TFT-LCD Driver IC
- 1.2 Manufacturing Process of Driver IC
- 1.3 Introduction to Touch IC
- 1.4 Development Trend of Touch IC
- 1.5 Technology Trend of Mobile Phone Touch Screen
- 1.6 Development Trend of Medium-sized Touch Screen
- 1.7 Development Trend of Laptop Computer Touch Screen
- 1.8 AIO PC Touch Screen
- 1.9 Advantages of METAL MESH
- 1.10 Supply Chain of METAL MESH
- 1.11 Nanometer Silver Wire

2. Display Downstream Market

- 2.1 Market Size of Touch Screen
- 2.2 Laptop Computer Market
- 2.3 Tablet PC Market
- 2.4 Mobile Phone Market
 - 2.4.1 Global Mobile Phone Market Size
 - 2.4.2 Smartphone Market and Industry
 - 2.4.3 China's Mobile Phone Market and Industry
- 2.5 UHD-TV Market

3. Touch and Driver IC Industry

- 3.1 Supply Chain of Driver IC
- 3.2 Development Trend of Driver IC

- 3.3 Display Driver IC Market
- 3.4 Display Driver IC Industry
- 3.5 Market Size of Touch Screen
- 3.6 Ranking of Touch Screen Vendors
- 3.7 Relationship between Touch Screen Vendors and Customers
- 3.8 Market Trend of Touch IC
- 3.9 Touch IC of ON-CELL
- 3.10 Market Size of Touch IC
- 3.11 Analysis on Touch IC Industry

4. Major Driver IC Vendors

- 4.1 Renesas
- 4.2 Novatek
- 4.3 Himax
- 4.4 Ilitek
- 4.5 Raydium
- 4.6 Orise
- 4.7 Sitronix
- 4.8 Fitipower
- 4.9 Silicon Works
- 4.10 Lusem
- 4.11 Magnachip

5. Major Touch IC Design Houses

- 5.1 Melfas
- 5.2 FocalTech
- 5.3 Goodix
- 5.4 ELAN

- 5.5 Synaptics
- 5.6 Cypress
- 5.7 Atmel
- 5.8 EETI
- 5.9 PIXCIR
- 5.10 MStar
- 5.11 Others
 - 5.11.1 Betterlife
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 - 5.11.3 Silead

6. Major Players in Driver IC Industry Chain

- 6.1 ChipMOS
- 6.2 Chipbond
- 6.3 VIS

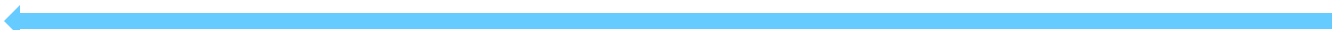
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