

Global and China ITO Sputtering Targets Industry Report, 2013-2016

May. 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

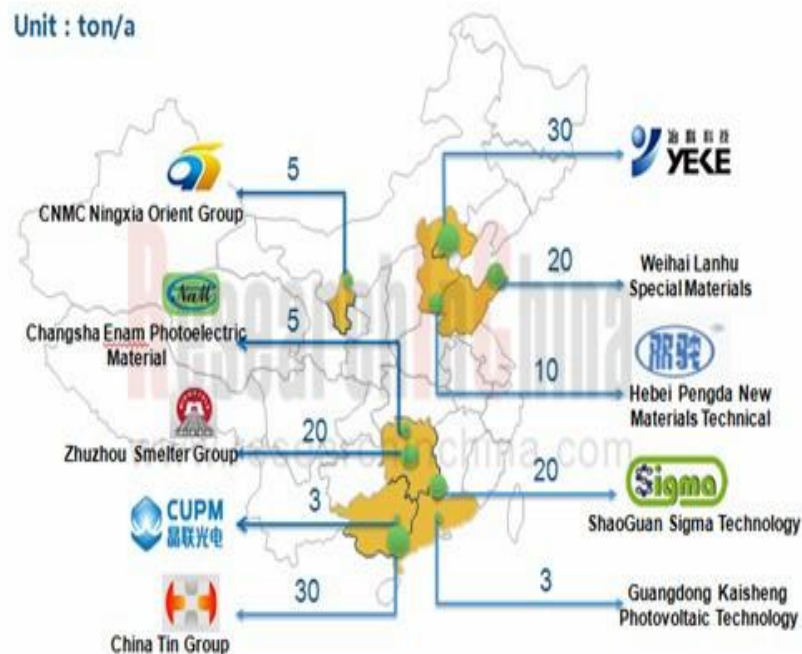
ITO (indium tin oxide) sputtering targets are one of the core and critical materials in electronic information area, mainly for the manufacture of flat panel liquid crystal displays, touch panel, thin film transistors, solar cells, transparent electrodes and multifunction glass.

Currently, global ITO sputtering targets are almost monopolized by a small minority of enterprises such as JX Nippon Mining & Metals, Mitsui Mining, Tosoh, Samsung, Heraeus and Umicore, in which Japanese and Korean companies account for nearly 80% of the market share. For lack of core technology, Chinese ITO sputtering target enterprises are still small in production scale, and basically in trial production or small batch production.

Global ITO sputtering target demand mainly comes from Japan, South Korea, mainland China and other Asian countries, of which China accounts for more than 35% of the total. Benefited from the rapid development of downstream industries such as flat panel displays, touch panels, etc., global ITO sputtering target demand will hit 2,500 tons or so by 2016, of which China's demand will exceed 40%, as it is estimated.

Capacity of ITO Sputtering Targets Companies in China

Unit : ton/a



Source : Global and China ITO Sputtering Targets Industry Report, 2013-2016, ResearchInChina

China is rich in indium in the world, whose basic reserves make up 62% of the world's total. Slow developments in downstream deep processing industries, especially in ITO sputtering target market, lead to substantial indium export in China, while ITO sputtering target present a high dependence on import.

In order to break bottlenecks in technology and capacity and utilize indium resource effectively, Chinese enterprises have accelerated R&D and introduction of ITO sputtering technology and multiple high-end ITO sputtering target localization projects have been launched. Zhuzhou Smelter Group Co., Ltd.: it has trial-produced ITO sintered sputtering target via mechanical mixing method by virtue of technological breakthroughs since 2008; in 2013, its 10-ton ITO sintered sputtering target production line was put into trial production, which showed a good effect in preliminary trial plating.

China Tin Group Co., Ltd.: it has built a complete ITO sputtering target process of hot-press approach and high temperature sintering method, which produces Jinhai ITO sputtering targets; in Nov. 2013, it introduced one 50-ton ITO sputtering target production line from Taiwan, which was used to produce high-end ITO sputtering targets for TET-LCD as planned.

Shaoguan Sigma Technology Co., Ltd.: embarked on ITO sputtering target field in 2002, it developed high-density large-sized sputtering target in Jan. 2008; in Sep. 2011, it completed ITO sputtering target production line with annual capacity of 20 tons, which was to be lifted to 100 tons in 2015 as it was planned.

Hebei Pengda Advanced Materials Technology Co. Ltd: the co-developed high-density ITO sputtering target project with School of Materials, Tianjin University, had finished trial production line in 2012, which gets annual capacity of 10-ton ITO sputtering target at present.

The reports include the following aspects:

- ✘ Supply & demand, competition, etc. in global ITO sputtering target market;
- ✘ Technical status quo, market supply & demand, competition pattern, development trends of Chinese ITO sputtering targets;
- ✘ Global and China indium market supply & demand, import & export, pricing, etc.;
- ✘ Status quo and demand forecasts of Global and China ITO sputtering target downstream industries;
- ✘ Analysis on seven global and ten Chinese key ITO sputtering target enterprises.

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- 6.2 JX Nippon Mining & Metals
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 - Technical Parameters for ITO Sputtering Target of Guangxi China Tin Group
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 - Market Share of Major ITO Sputtering Target Enterprises (by Capacity) in China, 2013

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