



Global and China ITO Sputtering Targets Industry Report, 2014-2017

Aug. 2015

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

As one of crucial materials in the field of electronic information, ITO (indium tin oxide) sputtering targets get chiefly utilized to manufacture flat LCD, touch screens, thin film transistors, transparent electrodes of solar cells and multifunctional glass.

With the prevalence of smart phones, tablet PCs and other mobile terminals, the global demand for ITO sputtering targets continues to increase, hitting about 1,950 tons in 2014, of which China accounted for about 36%. In 2017, the global demand will approximate 2,700 tons.

Although with its huge demand for ITO sputtering targets, China's output was as low as 90 tons in 2014. The ITO sputtering target technology has been mastered by a few companies in Japan and South Korea, while Chinese enterprises have been developing slowly in independent R & D.

Subject to technical constraints, the ITO sputtering targets made in China mainly target at the low-end market; whereas, the ITO sputtering targets used for high-end TFT-LCD and touch screens are almost imported from Japan and South Korea.

In view of this, Chinese enterprises over the recent years have accelerated R & D and introduction of the ITO sputtering target technology, and launched a number of high-end ITO sputtering target localization projects.

Zhuzhou Smelter Group: A 10 t/a ITO sintered target production line went into operation in 2013; a 60 t/a ITO sintered target industrialization project is under way.

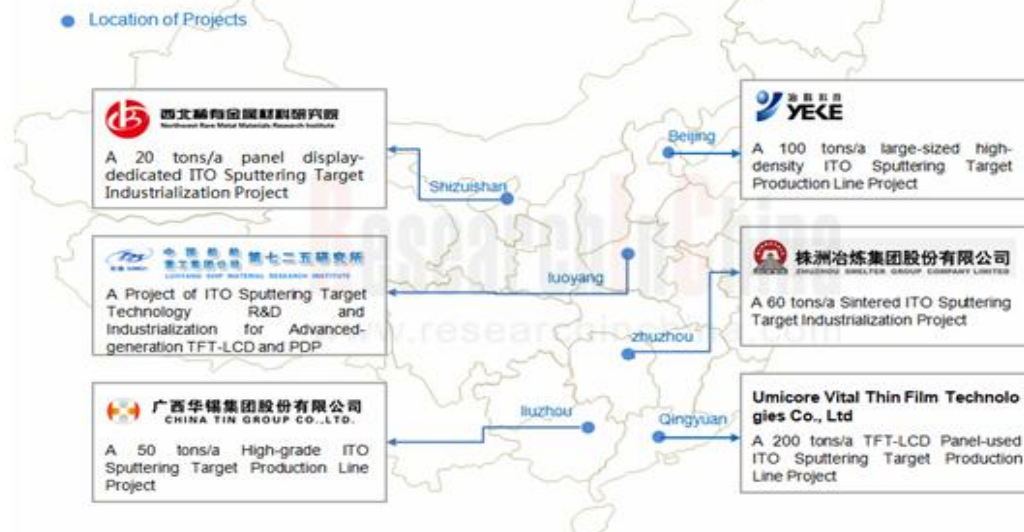
Luoyang Ship Material Research Institute: In October 2014, Phase I of the high-generation TFT-LCD and PDP-use ITO sputtering target technology R & D and industrialization project was put into operation; Phase II under construction is expected to go into production in 2016, by then the ITO sputtering target capacity will attain 100 tons / a.

Beijing Yeke: In 2015, it is building China's biggest large-sized high-density ITO sputtering target production line with the total investment of RMB229.21 million. The project is conducted by three phases, with the total capacity of 100 tons / a.

Hebei Pengda New Material Technical: In August 2014, the company's 10 t/a high-density ITO sputtering target technology R & D and industrialization pilot production line realized production.

In addition, international leaders, such as Umicore, have begun to enter the Chinese market. In July 2014, Umicore and Vital Materials set up a joint venture -- Umicore Vital Thin-film Technology Limited (contribution ratio: 60% VS 40%) with the total investment of RMB420 million. The joint venture is scheduled to achieve the annual capacity of 200 tons of ITO sputtering targets at the end of 2015.

China's Major ITO Sputtering Target Projects Proposed/under Construction. 2015



Source : Global and China ITO Sputtering Targets Industry Report, 2014-2017 ; by ResearchInChina

The report highlights:

- ✘ Supply, demand and competition situation of the global ITO sputtering targets;
- ✘ Technology, supply & demand, competition pattern and development trend of Chinese ITO sputtering targets;
- ✘ The global Indium supply, demand and price;
- ✘ China's indium market demand, import, export, price and major policies;
- ✘ Status quo and demand forecast of ITO sputtering target downstream industries;
- ✘ Operation, ITO sputtering target business and development plan of 7 global and 12 Chinese ITO sputtering target enterprises.

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