Global and China ITO Sputtering Targets Industry Report, 2016-2020

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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

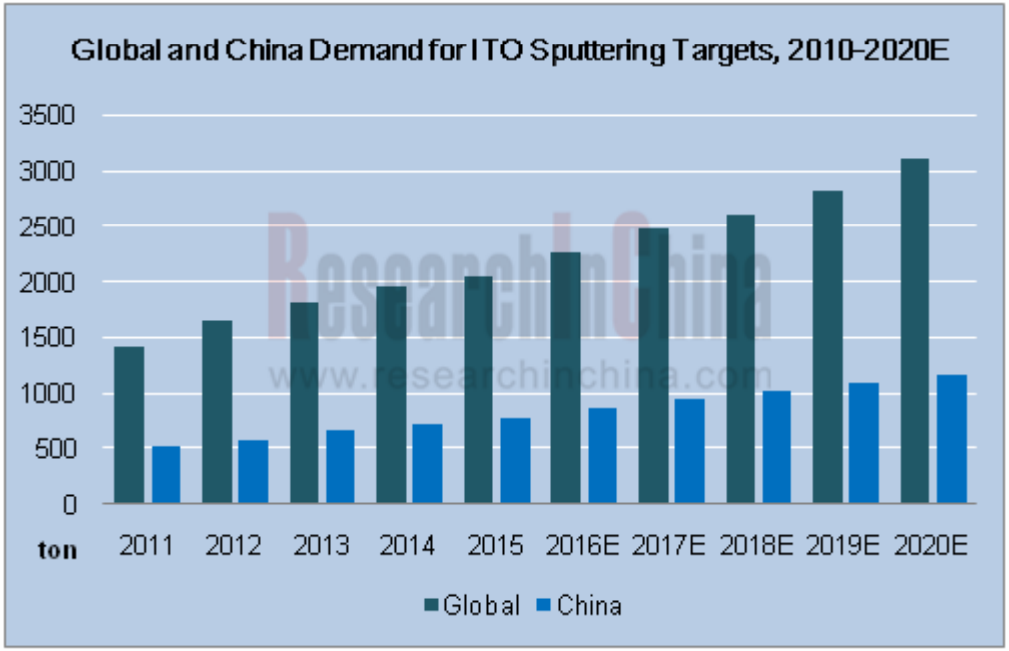
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Room 509, Building 1+1, No.10, Caihefang Road, Haidian District, Beijing, 100080
Phone: +86 10 82600828 ● Fax: +86 10 82601570 ● www.researchinchina.com ● report@researchinchina.com

Abstract

As one of the key materials in the field of electronic information, ITO (indium tin oxide) sputtering targets see stable growth in demand worldwide thanks to the development of LCD TVs, smart phones, tablet PCs and other downstream industries. The demand exceeded 2,000 tons in 2015, 1.7 times that in 2010; it is expected to surpass 3,000 tons by 2020.

Currently, the global ITO sputtering targets market is concentrated in Japan, South Korea, Mainland China and other Asian countries; among them, China accounts for more than 35% of the total global demand. As China vigorously promotes the flat panel display industry chain localization policy, the country's demand for ITO sputtering targets and other flat panel display materials will continue to rise, and that for ITO sputtering targets is expected to approximate 1,200 tons by 2020.



Although ITO sputtering targets are promising in China, technical limitations lead to a small scale of production herein. Besides, the ITO sputtering targets used for high-end TFT-LCD and touch screens are almost imported.

Furthermore, the reserves of indium which is the main raw material of ITO sputtering targets (roughly 70% of global indium is used for ITO sputtering targets) rest in a low level; meanwhile, conventional ITO films are not suitable for flexible applications, light transmittance and conductivity problems are not easy to overcome, so that silver nanowires, metal meshes, carbon nanotubes, graphene and other ITO alternative materials are being developed and applied in recent years.

The global ITO sputtering targets market is monopolized by JX Nippon Mining & Metals, Mitsui Mining & Smelting, Tosoh, Samsung, as well as a handful of companies in Germany and the United States, wherein Chinese, Japanese and South Korean players have seized more than 80% market share.

There are over 10 enterprises engaged in the production of ITO sputtering targets in China, but the vast majority of them are at the stage of small batch production, R&D or pilot production.

Beijing Yeke Nano Tech Co., Ltd. is China's largest manufacturer of ITO sputtering targets with annual design capacity of 100 tons. Its 60 t/a ITO sputtering targets industrialization project with total investment of RMB43 million passed EIA review in July 2016 and will be put into operation by the end of 2017.

Zhuzhou Smelter Group can produce 20 tons of ITO sintered targets annually. In 2016, a 60 t/a ITO sintered targets industrialization project is under way.

Guangxi Crystal Union Photoelectric Materials Co., Ltd. is one of the Chinese manufacturers which use cold sintering technology to produce ITO sputtering targets. In April 2016, its 60 t/a sputtering targets renovation and expansion project passed EIA review.

The report provides the following:

- Technology, supply & demand, competition pattern and development trend of the Chinese ITO sputtering targets market;
- Global and China's indium supply, demand, import, export and price;
- Status quo and demand forecast of downstream industries of ITO sputtering targets;
- Operation, ITO sputtering targets business and development strategy of 8 global and 11 Chinese enterprises.

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