



Global and China Organic Light-Emitting Diode (OLED) Industry Report, 2017-2021

Sep. 2017

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.

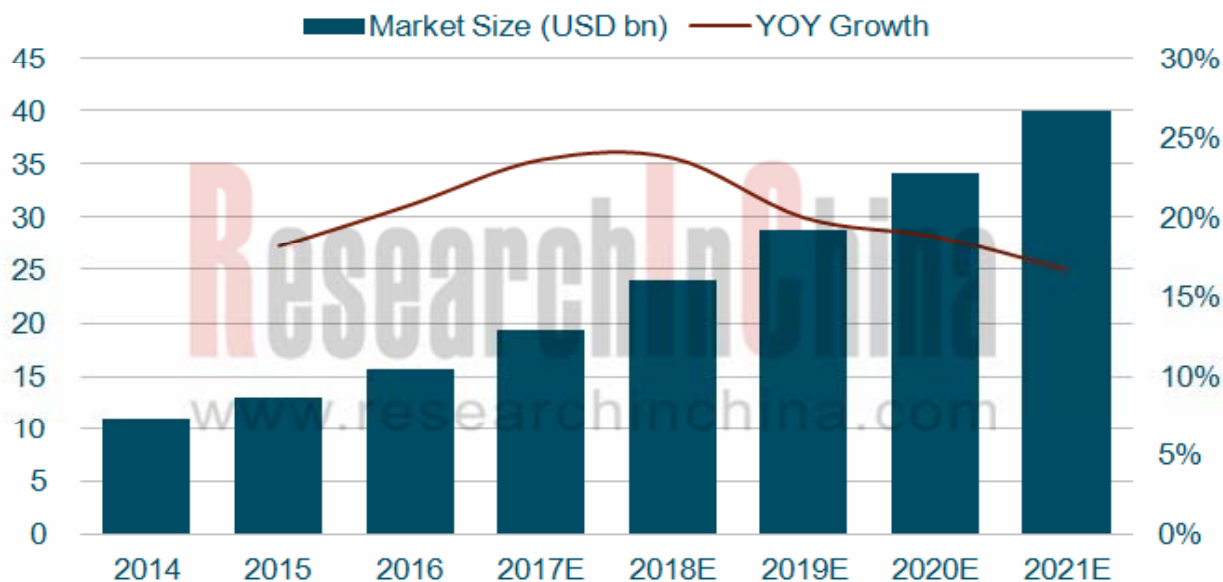
INFORMATION SOURCES

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

Abstract

Global OLED market size approximated USD15.7 billion in 2016, a 20.8% rise from a year earlier. Stimulated by reports that Apple will adopt OLED screen for multiple iPhone models in 2017-2018, OLED screen has become a hotspot in the smartphone market. Thanks to the introduction of more than 20 OLED phone models by Huawei, Xiaomi, VIVO, OPPO and other vendors, the demand for OLED has been growing rapidly, expected to create a market worth USD19.4 billion in 2017 and USD39.9 billion in 2021, showing an AAGR of over 20%.

Global OLED Market Size, 2014-2021



Source: Global and China Organic Light-Emitting Diode (OLED) Industry Report, 2017-2021

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OLED finds the largest application in mobile phone market which consumed 77% of OLED panels worldwide in 2016. Besides, OLED has made its way into TV, intelligent wearable device, lighting, VR and automobile fields. With regard to OLED television in 2017, Sony introduced OLED A1E Series television after ten years, Toshiba and Panasonic have rolled out OLED TVs, and Sharp will launch OLED television by 2018. Thus, more than 13 major color TV brands including LG, Skyworth, Changhong, Sony, Sharp, Panasonic, Toshiba, Konka, and Philips have chosen to use OLED display.

South Korean Samsung and LG Display held a combined over 90% of global OLED capacity. Specializing in small and medium-sized panels, Samsung accounted for 97% of global shipments of OLED panels for mobile phone in 2016; LG Display focuses on large-size OLED panels which are used in TV and other fields. Faced with the burgeoning OLED market, the two companies are speeding up capacity expansion so as to consolidate their market position.

Samsung Display plans to invest at least KRW 1 trillion (about USD900 million) on a new OLED display complex in South Korea before 2021 with the aim of boosting OLED display production. LG Display announced that it would invest a total of KRW 15 trillion into OLED production lines through 2020, consisting of one 10.5th generation large-size OLED panel production line and one 6th generation OLED panel production line in South Korea and a new 8.5th generation OLED panel production line in Guangzhou.

Chinese vendors are also scaling up their efforts for OLED with a view to achieve an early mass-production. Truly Group, Tianma Micro-electronics and Shenzhen China Star Optoelectronics Technology put OLED into mass production successively in 2016, adding capacity of 75K/M. BOE Technology Group, Tianma Micro-electronics and Visionox will start volume production of OLED in 2017, increasing new capacity of 69K/M. But, limited by low product yield and technical problems, the output is low for now and expected to explode after 2018.

In addition, panel vendors like Japanese JDI and Taiwanese AUO, Hon Hai/Sharp and Innolux have been slow in mass production of OLED. Sharp develops OLED at present, is predicted to produce it in small quantities in 2018, but still has a lot to do to achieve formal mass production. JDI announced on Aug 2017 that it planned to reorganize due to a lack of funds and, if it still wants to be present in OLED, needed global partners (Hon Hai and Tianma Micro-electronics being prospective ones).

Global and China OLED Industry Report, 2017-2021 focuses on the following:

- ◆ Global OLED market (size, shipments, capacity, competitive landscape, development trend. etc.);
- ◆ Applications (mobile phone, TV, wearable device, PC, VR, lighting, and automotive display) and their demand for OLED;
- ◆ Upstream materials & equipment and their supply of OLED;
- ◆ 16 global and Chinese major vendors (operation, OLED business, investment program, etc.).

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