

Mobile Phone Display Industry Report, 2007-2008



It is forecasted that the average price of TFT-LCD will drop, as a result of many new TFT-LCD lines to put into production in 2008. Those new TFT-LCD production lines consist of two 3G lines from Wintek, one 2G line from Truly, one 4.5G line from Tianma, one 3G line from Giantplus, and one 2.5G line, one 3G line and one 3.5G line purchased by PVI & Varitronix financial syndicate. Among which, only the production lines of Tianma and Truly are new ones, the rest are originally planned to produce large-sized TFT-LCD panels. Market supply will have a considerable growth in production capacity, but market demand will not have a substantial rise as expected. In addition, chief products like handset, digital camera, in-vehicle device and MP3 are in a period of maturity, and their demand will rise at most 10% year on year, while their production capacity will increase by more than 20% year on year. Therefore, naturally the average selling price will drop.

The time-honored giants like Sharp, Samsung, Hitachi and TMDisplay initiated the price war in the latter part of 2007 in advance, forcing the new entrants who are still inexperienced in mobile display field to confront the most serious competition in the beginning. Currently, the price of handset display is quite low, so there is little room for a big drop in the price in 2008.

Global economic situation will have a clear-cut impact on the industry of consumer electronics with mobile phone as the core product. A slowdown in global economy, particularly in the EU and the U.S.A., will have a huge impact on demand for luxurious consumer electronics. In the meantime, emerging economies of China and India are facing serious inflation or the threat of stagflation, which also dampens the demand for consumer electronics. The cycle may probably last for two to three years, and the worst crisis should be in the second half of 2009 instead of now. Prudent attitudes should be taken towards the expansion of consumer electronics industry. Yet, it will be the best time for those powerful companies to carry out expansion or acquisition plan by then.

Market Shares of Global Medium- and Small-sized Display Manufacturers

Manufacturer	Sales in 2007 (US\$ million)
Sharp	4,772
TMDisplay	2,485
Epson	1,915
Hitachi Display	1,581
AUO	1,264
Samsung SDI	1,220
TPO	1,115
wintek	998
Truly	908
Samsung	880
Giantplus	397
LG Display	758
Tianma	642
CPTF	556
CHIMEI	372
PVI	335

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