

# China Sourcing Report: Display Parts & Components

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## Abstracts

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China's display parts and components industry remains in an upturn. Suppliers expect sales and exports to swell at least 30 percent by year-end.

Buoyed by the projection, makers are raising production levels, especially of categories growing in popularity because of the trend for energy conservation and environmental protection. These include LEDs, LED panels and modules, TFT-LCD modules and LCD panels, which represent the replacement technologies in the lighting, display and backlighting sectors.

To ensure the expansion bid, companies are consolidating resources and enhancing operations. They also continue to build core competence to strengthen China's position globally. For this, R&D efforts share equal attention in manufacturers' goal to match requirements in a broadening application base.

## Key findings

Prices are expected to increase with rising material and labor costs. The adjustment, however, will be limited to 10 percent due to intensifying competition. For the same reason, a number of makers are lowering their quotes.

The majority of respondents are confident of robust export sales despite rising outlay. They are counting on the "green" trend to continue fueling demand, especially from North America and Europe. These will remain key overseas destinations.

Enterprises are also exploring opportunities in the local sector, particularly government-sponsored solid-state lighting projects.

LEDs' spreading adoption will push China's output to 25.7 billion units and sales value to \$3 billion this year.

Diode-based panels and modules, and TFT-LCD types of the second will post a 30 percent increase in production. The first two are projected to total 3 billion units and the last 110 million.

LCD panels are catching up at the same rate based on the projected yield of 26.5 million square meters by end-2011. This is amid the scheduled opening of 8 and 8.5G TFT lines, which will complement existing 4.5, 5 and 6G operations.

Concurrent to R&D pursuits, makers are collectively addressing IPR issues through short- and long-term solutions. The goal is to improve core technological competence at company and industry levels, reduce dependence on imported components, and establish a comprehensive supply chain.

## **Scope & methodology**

This report covers the major products of China's display parts and components industry, namely LCD panels, modules and backlights, LEDs, LED chips, strips, panels and modules, and EL displays. For each category, details about the different types offered, their common features and price determinants are provided.

The Industry Overview elaborates on issues affecting production and exports. It also identifies the common strategies manufacturers are employing to boost sales and enhance overall competitiveness.

To reflect the industry structure, the majority of the suppliers featured in this report are local and privately owned enterprises. Publicly listed/SOE, Hong Kong- and Taiwan-invested businesses are also covered.

The province of Guangdong is the main production center. Reflecting this structure, 74 percent of featured companies are based in this location.

To produce this report, Global Sources interviewed a wide range of suppliers. Rather than focus simply on high-profile makers, we compiled a representative sample of large, midsize and emerging manufacturers. All profiled companies are export-oriented professional suppliers that are verified by Global Sources.

Each supplier is confirmed to be authentic with a legally registered business. All companies are visited three or more times by Global Sources to ensure they are export-ready and have real offices and products.

The listed contact person has been verified to represent the registered company. In each case, companies were required to answer specific questions designed to verify their manufacturing and export credentials.

All profiled suppliers participated in a survey designed to provide insight into price trends, sales outlook and target markets in the next six to 12 months. All survey questions are single choice. Results were calculated based on the actual number of valid responses to each question.

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