

Chip Scale Package (CSP) LED Market by Application (Backlighting Unit (BLU), Flash Lighting, General Lighting, Automotive, Others), Power Range (Low- & Mid-Power, and High-Power), and Geography (APAC, North America, Europe, RoW) - Global Forecast to 2023

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Abstracts

The CSP LED market is estimated to be USD 757.7 million in 2018 and is likely to reach USD 1,744.8 million by 2023, at a CAGR of 18.2% during 2018–2023. The low-cost potential of CSP LEDs with a low bill of materials, which is because of the manufacturing process, where several packaging steps are omitted, is a major factor driving the growth of the CSP LED market. High competition in the packaged LED market has led to the development and launch of new and innovative products with improved designs and high-end specifications. Overburden on LED foundries and restricted use of CSP LEDs in premium products so far are the restraining factors in the market.

Increased use of CSP LEDs in display backlighting and flash applications is driving the market towards high growth

The display backlighting application is expected to dominate the CSP LED market, in terms of market size, during the forecast period, as it is pulled by the demand for energy efficient and compact backlighting sources for TVs, monitors, and smartphone displays. CSP LEDs emerged as great replacement of traditional and large LED packages for display backlighting units. CSP LED-based BLUs drive product innovation and cost reduction along with small form factor and wide beam angle. Although the market for BLU is expected to saturate, CSP LED-based BLUs are expected to witness significant

growth during the forecast period. APAC includes world's largest smartphone manufacturers and with better features offered by CSP LED, the adoption is expected to increase in a majority of premium smartphones for flash lighting application.

APAC to account for the highest demand for CSP LEDs during the forecast period

APAC accounts for the production of a majority of LCD displays, especially in South Korea, Taiwan, China, and Japan. With the presence of leading CSP LED manufacturers and customers (i.e. smartphone vendors, backlighting panel integrators, and display panel manufacturers), this region registered the largest shipment of CSP LEDs. The dominance of APAC is mainly due to South Korea, followed by China, Japan, and Taiwan with high demand for CSP LEDs for display backlighting, mobile flash, and other applications. The growth in APAC will also be driven by the rise of newer CSP LED applications in general lighting and automotive. The surge in demand for these applications will be because of high economic growth in the region and focus of governments on energy efficient lighting solutions.

Extensive primary interviews have been conducted with key people in the industry to determine and verify the size of several segments and subsegments of the market. The breakup of the primary participants has been shown below:

By Company Type: Tier 1 – 20 %, Tier 2 – 35%, and Tier 3 – 45%

By Designation: C-Level Executives – 30%, Directors – 45%, and Others – 25%

By Region: North America – 20%, Europe – 45%, APAC – 30%, and RoW – 5%

Key players profiled in this report are Lumileds (The Netherlands), Samsung (South Korea), Seoul Semiconductor (South Korea), LG Innotek (South Korea), OSRAM (Germany), Nichia (Japan), EPISTAR (Taiwan), Cree (US), Genesis Photonics (Taiwan), Lumens Co., Ltd. (South Korea), SemiLEDs (Taiwan), Lextar (Taiwan), Shenzhen MTC (China), Unistars (Taiwan), DPower (China), Plessey Semiconductors (UK), Cambridge Nanotherm (UK), Honglitrionic (China), Bridgelux (US), OPTOLED (South Korea), EVERLIGHT (Taiwan), Flory Optoelectronic Materials (FOM) (China), Dow Chemical Company (US), TDK (Japan), and Bree Optronics (China).

Research Coverage:

This research report categorizes the market on the basis of CSP LED applications, power ranges, and geographies. The report discusses drivers, restraints, challenges, and opportunities for the market and analyzes emerging trends throughout the value chain of CSP LEDs. Key market players across the value chain have been strategically profiled in the report.

Key Benefits of Buying the Report:

The report will help leaders/new entrants in this market in the following ways:

1. This report segments the CSP LED market comprehensively and provides the closest market size estimation for major applications across various regions.
2. The report would help stakeholders understand the pulse of the market through the information on drivers, restraints, challenges, and opportunities pertaining to the market.
3. This report would help stakeholders better understand their competitors and gain insights on ways to improve their position in the market. The competitive landscape section includes the competitor ecosystem, product developments, partnerships, and mergers & acquisitions in the market.

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