

Display Material Market by Technology (LCD, OLED), Component & Material (Substrate, Polarizer, Color Filter, Liquid Crystals, BLU, Emitter & Organic Layer, Encapsulation), Panel Type, Application (Smartphone, Television), Region - Global Forecast to 2023

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Abstracts

“The display material market is projected to grow at a CAGR of 3.1% during the forecast period”

The display material market was valued at USD 28.87 billion in 2017 and is expected to reach USD 34.60 billion by 2023, at a CAGR of 3.1% between 2017 and 2023. Construction and upgrade of display panel manufacturing plants in APAC, increasing average screen size and resolution of television units, and increased adoption of OLED display technology in various applications significantly drive the market growth.

High growth of OLED and quantum dot LCDs as well as emerging technologies such as micro-LED and true quantum dot are expected to provide good growth opportunities for display material providers in the future. Exclusivity and IP protection of advanced technologies is preventing entry of new players in the market for these advanced technologies, thus slightly hindering the growth of the display material market.

“The emitter and organic layer materials to dominate the OLED display material market during the forecast period”

Emitter and organic layer materials held the largest share of the OLED display material market in 2016. Emitter and organic layer include various sub-layers such as emitting layer (emissive material) (EML) (RGB), hole transport layer (HTL) and hole injection layer (HIL), and electron transport layer (ETL) and electron injection layer (EIL). The

industry leaders have increased their investments to improve these materials and to subsequently obtain improved energy-efficiency and increased lifetime. The market for substrates is expected to grow at the highest CAGR during the forecast period. There is a continuous demand for high-quality and thin substrate sheets from OLED display panel manufacturers. Flexible displays are manufactured on plastic substrates, whereas glass substrates are used to produce rigid OLEDs.

“The display material market in China is expected to grow at the highest CAGR during the forecast period”

The demand for display materials from China is expected to increase rapidly during the forecast period as various Chinese players such as BOE, CSOT, Tianma, and Truly are constructing several LCD and OLED plants. A large number of operations related to LCD displays are being shifted to Mainland China owing to the favorable government policies and lower costs associated with logistics operations concerning the delivery of end products in the display panel market. South Korea accounted for the largest share of display material market in 2016 owing to the presence of industry leaders such as Samsung and LG.

In the process of determining and verifying the market sizes for several segments and subsegments, gathered through secondary research, extensive primary interviews have been conducted with key industry experts. The break-up of the profile of primary participants is given below:

By Company Type: Tier 1 – 55 %, Tier 2 – 25%, and Tier 3 – 20%

By Designation: C-Level Executives – 10% , Directors – 40%, and Others – 50%

By Region: North America – 25%, Europe – 20%, APAC – 55%

The major players profiled in the report are Samsung SDI (South Korea), LG Chem (South Korea), Sumitomo Chemical (Japan), Corning (US), Nitto Denko (Japan), Universal Display Corporation (US), Merck (Germany), Asahi Glass (Japan), Idemitsu Kosan (Japan), DowDuPont (US), Toray (Japan), DIC Corporation (Japan), Hodogaya Chemical (Japan), and JSR Corporation (Japan).

Research Coverage

The geographic segmentation of the market covers APAC in this report. The major countries therein include South Korea, China, Japan, and Taiwan. The market is segmented on the basis of display technologies such as LCD and OLED. The LCD material market is segmented on the basis of component and material, and application. Whereas the OLED display material market is segmented on the basis of component and material, application, and display panel type.

Key Benefits of Buying the Report

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

1. This report segments the display material market comprehensively and provides the closest market sizes for the segments and subsegments across different applications.
2. The report helps stakeholders to understand the pulse of the market and provides the information on key market drivers, restraints, challenges, and opportunities.
3. This report would help stakeholders to better understand their competitors and gain more insights to enhance their position in the business. The competitive landscape section includes competitor ecosystem and major developments such as product launches and developments, mergers and acquisitions, partnerships, agreements, collaborations, and recent developments in the display material market.

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About

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Some of the prominent players in the display material market are

Samsung SDI (South Korea)

LG Chem (South Korea)

Sumitomo Chemical (Japan)

Corning (US)

Nitto Denko (Japan)

Universal Display Corporation (US)

Merck (Germany)

Asahi Glass (Japan)

Idemitsu Kosan (Japan)

DowDuPont (US)

Toray (Japan)

DIC Corporation (Japan)

Hodogaya Chemical (Japan)

JSR Corporation (Japan)

LCD held larger share of display material market in 2016

Despite the decline in unit shipments, production area of LCD displays increased in 2016, and the trend is expected to continue till 2019. Samsung and LG decreased their LCD production capacity in 2015 and 2016; however, BOE Technology, CSOT, Tianma, and Truly are rapidly increasing their production capacity. Several Chinese companies are also planning to construct new LCD manufacturing plants by 2018, which would further increase the LCD display production. Polarizing films dominated the LCD display material market, accounting for the largest share in 2016. The substrate sheets followed the polarizers, in terms of the market share.

OLED display material market to grow rapidly during forecast period

Being an emissive technology, pixels in OLED display act as light as well as color source. This benefits the OLED display panel manufacturers with regard to producing thin display panels and requiring less materials or components. Samsung and LG have made huge investments in the OLED technology in the past 3 years.

The OLED display material market for substrates is expected to grow at the highest CAGR during the forecast period. There is a continuous demand for high-quality and thin substrate sheets from OLED display panel manufacturers. Flexible displays are manufactured on plastic substrates, while rigid substrates are manufactured on glass substrates.

Television application to account for largest share of LCD display material market during forecast period

Television application accounted the largest share of the LCD display material market in 2016. Televisions account for a smaller share of the market than smartphones, in terms of unit shipments; however, in terms of area production, televisions account for the largest market share. The demand for televisions is declining year-over-year (y-o-y)

since 2015; however, the average panel size is increasing by few inches per year. This has led to the increased consumption of display materials used in LCD display panels for the television application.

South Korea accounted for largest share of display material market in 2016

South Korea accounted for the largest share of display material market in 2016 owing to the presence of industry leaders such as Samsung and LG. The South Korean LCD display material market witnessed sluggish growth in 2016 and 2017 due to the closure of various LCD plants by Samsung and LG. However, the demand for OLED materials would eventually increase in the country as these 2 players are producing the largest stack of OLED panels.

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