Global and China Display Driver and Touch IC Industry Report, 2013-2014

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Abstracts

Global and China Display Driver & Touch IC Industry Report, 2013-2014 involves the followings:

1. Introduction to Display Driver IC and Touch IC
2. Technology Trends of Small-, Medium- and Large-sized Touch screens
3. Status Quo and Trend of Metal Mesh and AgNW
4. Analysis on Display Downstream Market
5. Analysis on Display Driver IC Market and Industry
6. Analysis on Touch IC Market and Industry
7. 11 Driver IC Design Houses
8. 10 Touch IC Design Houses

In 2013, global display driver IC market size skyrocketed by 10.7% to USD 6.882 billion, and is expected to be worth USD 7.278 billion in 2014, with an increase of 5.6%.

The rise in the display driver IC market scale can be attributed to the factors below:

Market acceptance of 4K2K UHD-TV exceeded expectations and it is expected that market size will expand rapidly.

Resolution of screens on mobile phones and tablet PCs improved significantly, and there will be at least 30 million mobile phones with QHD (Quad High Definition, 2560*1440) screens to be shipped in 2014, including blockbuster Samsung S5, G3 from LG, Lumia 1820 from Nokia, and Find7 from OPPO.

Resolution of computer display and notebook computer screen also improved substantially, and the number of Driver IC increased greatly.

The most noteworthy in Driver IC industry in 2014 is the sale of Display Driver IC unit by Renesas. Since its inception, Renesas has operated in the red. In order to dig its way out of losses, the company sold some non-core assets, while its medium and small-sized Display Driver IC unit is fairly profitable. Renesas is a principal supplier of driver IC for Apple phones, but its main business comes to MCU. Broadcom, Synaptics and Novatek will be the most likely buyers. Especially, Synaptics, a leading company in touch IC market, would become a dual leader in medium and small-sized Display Driver IC and Touch IC markets, if its bid for Renesas succeeded.

For its future trend, the touch IC of mobile phone is to be integrated mainly driven by cost and technology. Technically, it can be integrated with either Driver IC or AP, with the former being expected to be the mainstream. In addition to cost cuts, On-cell/In-cell technology is more suitable for integrating Driver IC and Touch IC. As parts of LCD display module, Driver IC and Touch IC can be completely independent of AP. It is expected that TDDI (Touch Display Driver IC) will start to be shipped progressively from the second half of 2014.

Another trend in Touch IC field is In-cell and On-cell. In the past, On-cell was mainly expensive and noble AMOLED panel. However, from the year 2014, we will see a-Si LCD mobile phone panel equipped with On-cell Touch to be shipped from Taiwanese and Chinese companies, including AUO, Innolux, CPT, Hannstar, BOE and Tianma, etc. It is expected that 5%-10% of China’s mobile phone industry will be provided with On-cell Touch LCD. Several IC tycoons are producing On-cell Touch IC, among which Synaptics releases its production at the fastest pace, followed by FocalTech.

In Touch IC market, as mid- to lower range mobile phones have no interest in multi-point touchscreen, the mainstream market is still dominated by self capacitance Touch IC, which has a relatively low entry barrier and is faced with fierce price war. Relying on its advantages in supply chain, Taiwanese players can achieve the lowest costs, forcing mainland peers out of the market, but do not make handsome profit. In 2013, Touch IC market size edged up only 7.4%, and its growth rate will continue to slow in the future. The driving force of the market is in Touch IC field of In-cell/On-cell. Although its market is large, the low- and medium-end market generates meager profits.

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