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Global and China Display IC Industry Report, 2014-2015

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Abstracts

The report contains the following aspects:

1. Development trends of LCD driver IC and touch IC
2. Analysis on downstream markets of LCD driver IC and touch IC
3. Analysis on LCD driver IC and touch IC Industries
4. Study on 10 LCD driver IC vendors
5. Study on 13 touch IC vendors and peripheral vendors

In the field of LCD driver IC and touch IC, two major acquisitions occurred in 2014. Synaptic took over the small and medium-sized driver IC business of Renesas; and FocalTech (the world's largest touch IC vendor by shipment) acquired Orise. Besides, the OGS touch giant Wintek went bankruptcy due to debt crisis.

Except 4K TV, LCD driver IC lacks highlights. Although the display resolution of mobile phones gets greatly improved, the ASP of LCD driver IC does not jump. After years of rapid growth, the mobile phone market has been saturated obviously, even the growth rate of smartphones has slowed considerably. Except first-tier brand vendors, second and third-tier brand vendors witness substantial decline in the mobile phone shipment.

In 2014, Chinese mobile phone market saw the first decline in the past 15 years, and the cumulative shipment decreased by 21.9% from 579 million in 2013 to 452 million, in which the shipment of handsets under domestic brands fell 23.3%. China’s smartphone shipment amounted to 389 million in 2014, marking China was still the world's largest smartphone market, but this figure was 8.2% lower than 2013. The tablet PC shipment dropped for three consecutive quarters, and many Chinese small and medium-sized tablet PC vendors collapsed. The only bright spot is 4K TV. After experiencing the first replacement tide that LCD replaced CRT, the TV industry is confronted with the second wave of replacement. Larger screens, lower prices and more high-resolution program sources stimulate the TV market.

Touch IC experienced a painful year in 2014. The yield of In-CELL / On-Cell was improved significantly, while the price slumped. For example, FocalTech's touch IC ASP was NTD47.28 in 2011, NTD27.98 in 2013 and NTD18.15 in Q3 2014, representing the decline rate of 61.6 %.

It is a clear trend that In-CELL / On-Cell uses the combination of LCD driver IC and touch IC, which needs higher costs but intensifies performance apparently and shortens the supply chain. In 2018, the market share of In-CELL / On-Cell is expected to exceed 65%. In this case, touch IC vendors must conduct restructuring in advance, like Synaptic that took over the small and medium-sized driver IC business of Renesas as well as FocalTech that acquired Orise.

In order to retain customers and quickly open the market when launching new products, touch IC vendors have reduced prices to seize the market amid the sluggish mobile phone market, resulting in the sharp decline in their gross margin. The trend will continue in 2015, and ASP may flop by 20-30%.

Small Out-cell touch IC vendors will feel difficult to survive independently in the future, maybe acquired by LCD driver IC vendors or closed down. Touch IC vendors must avoid mobile phones and tablet PC filed, while industrial control and automotive fields are better options for them.

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Contents

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Selected Charts

SELECTED CHARTS

Driver IC Manufaturing Process
Development Trend of Global Smartphone Touch Technology, 2013-2017E
Development Trend of Global Smartphone Display Technology, 2013-2017E
Medium-sized Touch Screens by Technology, 2011-2015
Laptop Computer Touch Screen Shipment by Technology, 2012-2016E
AIO PC Touch Screen Shipment by Technology, 2012-2016E
Supply Chain of Silver Nanowires
Global Touch Screen Market Size, 2010-2016E
Global Touch Screen Market Size (Shipment), 2010-2016E
Laptop Computer Shipment, 2008-2015
Shipment of World's Major Laptop ODM Vendors, 2010-2013
Global Tablet PC Shipment, 2011-2016E
Market Share of Main Tablet PC Brands, 2013
Output of Global Tablet PC Vendors, 2012-2013
Global Mobile Phone Shipment, 2007-2015E
Global 3G / 4G Mobile Phone Shipment by Region, 2011-2014
Worldwide Mobile Phone Sales to End Users by Vendor in 2013
Worldwide Mobile Phone Sales to End Users by Vendor in Q3 2014
Worldwide Smartphone Sales to End Users by Vendor in 2013
Worldwide Smartphone Sales to End Users by Operating System in 2013
Shipment of Global Top 13 Smartphone Vendors, 2013-2015E
Worldwide Smartphone Sales to End Users by Vendor in Q3 2014
Worldwide Smartphone Sales to End Users by Operating System in Q32014
China's Monthly Mobile Phone Shipment, Jan-Nov 2014
Market Share of Main Vendors in Chinese Smartphone Market, 2014
Market Share of Main Vendors in Chinese 4G Mobile Phone Market, 2014
UHD TV Shipment, 2013-2017E
55-inch UHD TV Price vs. FHD TV Price
Shipment of Top 15 TV Vendors, 2014-2015
Global Display Driver IC Market Size, 2009-2016E
Global Display Driver IC Market Size by Type, 2009-2014
Supply Relationship between Driver IC and Panel Vendors
Ranking of Major Global Driver IC Vendors by Revenue, 2010-2014
Operating Margin of Major Global Driver IC Vendors, 2012-2014
Resolution Distribution of China's Small and Medium-sized Driver IC, 2010-2018E

Himax's Shipment, 2002-2014
Himax's Gross Margin, 2007-2013
Himax's OPEX, 2007-2013
Himax's Quarterly Revenue by Product, Q3 2011-Q3 2014
Himax's Quarterly Operating Expenses, Q1 2011-Q3 2014
Himax's Quarterly Gross Margin, Q3 2011-Q3 2014
Proportion of Himax's Key Customers, 2007-2013
Himax's Products and Customer Distribution
Himax's Supply Chain
Himax's Subsidiaries
Himax's Global Presence
ILITEK's Revenue and Operating Margin, 2007-2014
ILITEK's Monthly Revenue and Growth Rate, Dec 2012- Dec 2014
ILITEK's Shipment, 2007-2014
ILITEK's Shipment by Application, 2008-2013
Raydium's Revenue and Operating Margin, 2007-2014
Raydium's Monthly Revenue and Growth Rate, Dec 2012- Dec 2014
Raydium's Output, Sales Volume and Output Value, 2011-2013
Orise's Revenue and Operating Margin, 2007-2014
Orise's Quarterly OPEX, Q1 2010-Q4 2013
Orise's Revenue, Q1 2010-Q4 2013
Orise's EBT, Q1 2010-Q4 2013
Orise's Monthly Revenue and Growth Rate, Dec 2012- Dec 2014
Orise's Output, 2008-2011
Orise's Sales Volume, 2008-2013
Orise's Revenue by Product, Q1 2009-Q4 2013
Orise's Revenue by Customer, Q2 2012
Orise's Revenue by Customer, Q4 2013
Orise's Quarterly Shipment, Q1 2009-Q2 2013
Sitronix's Revenue and Operating Margin, 2006-2014
Sitronix's Monthly Revenue and Growth Rate, Dec 2012- Dec 2014
Sitronix's Revenue by Product, 2011-2014
Fitipower's Monthly Revenue and Growth Rate, Dec 2011- Dec 2014
Revenue and Operating Margin of Silicon Works, 2009-2014
Revenue of Silicon Works by Product, 2009-2013
Lusem's Organizational Structure
Magnachip's Revenue and Gross Margin, 2004-2013
Magnachip's Revenue by Business, 2004-2013
Magnachip's Revenue by Region, 2009-2013

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