

Global and China Electronic Glass Industry Report, 2012

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Abstracts

The report highlights the followings:

Touch panel market and industry

LCD market and industry

Solar cell market and industry

Cover glass market and industry

15 major electronic glass companies

The electronic glass roughly consists of LCD substrate, solar cell glass and capacitive touch panel cover glass.

In 2011, the LCD substrate market size worldwide hit USD15.846 billion; in 2012, due to the dive of LCD-TV market, the LCD substrate market saw oversupply, causing the market value down to USD13.533 billion as a result of the price slump of large-sized LCD substrate. It is estimated that the LCD substrate market is likely to continue to drop by less than 9% in 2013.

There is a high threshold for accession into LCD substrate industry. The combined market occupancy of the world's four leading LCD substrate tycoons surpasses 95%. As estimated, the market share of Corning will reach 21% in 2012; that of Samsung Corning, 50% stake of which is held by Corning, will realize 23%; that of AGC and NEG

will be 27% and 28% respectively. In the Chinese market, Corning contracts glass substrate business of BOE; AGC undertakes the glass substrate business under CSOT Corporation, while NEG becomes the glass substrate supplier of Shanghai-based Tianma Micro-electronics and Inovision Optoelectronics. NEG, the sole company with the rising market occupancy, is mainly driven by its largest customer LG Display. AGC has set its footholds in South China and, is expected to outdo NEG in the future.

In 2012, the PV industry encountered frigid winter, so the PV glass market suffered a slash in profit while the shipment saw a slight drop. In general, the PV glass mainly falls into ultra-clear PV patterned glass, ultra-clear float glass and TCO glass; wherein, the market size of ultra-clear PV patterned glass is predicted to approximate USD1.503 billion in 2012, down 5% from a year earlier, and the market scale of TCO glass will be around USD862 million, a light decline of 5% from 2011.

In terms of performance, cover glass is the best. In 2012, equipments valued USD855 million are equipped with cover glass, of which, 86% comes from mobile phones and 12% from tablet PC. In 2012, the market scale of cover glass soared to USD3.13 billion spurred by the robust demand for Apple products in 2012, compared to the USD2.15 billion in 2011. The top 3 players are Fuji Crystal (Bern Optical), LENS Technology and G-Tech Optoelectronics Corp.

Major bases of Bern Optical are located in Shenzhen and Huizhou. For Apple, around 45% cover glass products are offered by Bern Optical. And bases of LENS Technology mainly sit in Changsha, Liuyang and Shenzhen; G-Tech Optoelectronics Corp. is affiliated to Foxconn Technology Group; Firstar Panel, a company located in the Chinese mainland, is heavily reliant on its big customer-Nokia. Since the sales volume of Nokia performed poorly, the business performance of Firstar Panel also declined.

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