

Global and China LCD Backlight Unit (BLU) Industry Report, 2011-2012

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Abstracts

Global and China LCD Backlight Unit (BLU) Industry Report, 2011-2012 covers the followings:

Introduction to LCD Backlight Unit

LCD Backlight Unit Market

LCD Panel Market

11 Major LCD Panel Players

12 Major LCD Backlight Unit Enterprises

4 Manufacturers of LED Chips for LCD-TV

In 2012, the LCD backlight unit market size approximated UR\$15.5 billion, down 3.1% from US\$16 billion (a YoY decline of 4.2% over 2010) in 2011. The continuous decline mainly resulted from the sharp fall in the price of LED chips, the key raw materials for backlight unit. Meanwhile, due to the insufficient demand for TVs, it is expected that in 2012, the global LCD-TV market size will be 216 million units, with a growth rate of merely 2.85%.

For backlight unit enterprises, the light guide plate (LGP) technology acts as the core. As backlight unit exerts great effect on the performance of LCD panel, LCD panel companies have all held or participated in backlight unit enterprises, which are usually

supposed to have one client of the LCD panel, e.g. Heesung Electronics and New Optics are suppliers merely to LG Display; Hansol, DID, DSLCD and TAESAN supply Samsung alone. There are only three independent large-scale backlight unit enterprises worldwide, namely, Coretronic, Radiant and Kenmos.

In recent years, the share held by Korean enterprises has continued to decline with poorer ability to control cost and they need to purchase LGP from the Taiwanese counterparts with more advanced LGP technology. Taiwanese players like Radiant obtained 70% of the total revenue from Korea, but in 2008, this figure slumped to 34%.

For the backlight unit industry, the Open-cell and Hinge-Up which made their debut in 2011 are not only great opportunities but challenges. Hinge-Up chiefly caters to the ultra-thin Ultrabook, backlight unit enterprises need to place the front cover of Ultrabook and LCM into one module, i.e. Module In Backlight (MIB), and both LCM process and the front cover of Ultrabook should be completed. This is difficult for backlight unit manufacturers to do the job, and globally, only Radiant is competent for it, which secures its significant growth in revenue (more than 40% and 20% in 2011 and 2012, respectively) against the overall decline of the backlight unit industry.

Open-Cell can also be used in ultra-thin LCD-TVs and table PCs. For more thinness, backlight unit enterprises must conduct shipment via LCM, so as to be 1-2 mm thinner than traditional means. Enterprises capable to grow in 2012 all have been provided with LCM assembly capacity.

The LCD panel industry in Mainland China has seen rocket growth in 2012, accompanied by significant rise in shipments of CSOT and BOE G8.5 generation lines, but the supporting backlight units come from South Korean and Taiwanese enterprises, of which, CSOT mainly cooperates with Coretronic Corporation; and major suppliers of BOE include Japan-based Chatani, South Korea-based On-Nuri and Nanohitec.

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