

Global and China TFT-LCD Industry Report, 2014-2015

<https://marketpublishers.com/r/GE461E7396DEN.html>

Date: November 2014

Pages: 115

Price: US\$ 2,300.00 (Single User License)

ID: GE461E7396DEN

Abstracts

Global and China TFT-LCD Industry Report, 2014-2015 contains the following aspects:

1. Introduction to TFT-LCD
2. Research on TFT-LCD upstream industries (glass substrate, backlight module, polarizer, driver IC)
3. Analysis on TFT-LCD market and industry
4. Study on 12 TFT-LCD vendors

The TFT-LCD industry touched the bottom in 2011, then has warmed up slowly since 2012 and is expected to reach its peak in early 2015, but it will fall into another lengthy decline stage by 2016. After the TFT-LCD industry slumped, TFT-LCD vendors in different countries chose varying countermeasures. South Korean vendors represented by Samsung strived to explore the OLED field. In Japan, Sharp transferred to be a small and medium-sized panel vendor, produced mobile phone panels with 8.5-generation lines and vigorously developed IGZO technology. Hitachi, Sony and Toshiba set up a joint venture ----- Japan Display (referred to as JDI) to develop LTPS technology. Taiwanese vendors developed 4K HD technology. Chinese mainland vendors promoted the construction of new production lines at low costs aggressively. As a result, Chinese mainland vendors are the most notable winners, followed by Taiwanese and Japanese counterparts, while Samsung is the biggest loser.

South Korean vendors chose the wrong direction, because the current-based OLED can not replace the voltage-based LCD due to following factors. Firstly, OLED requires LTPS technology, which means its cost is much higher than LCD. Secondly, the resolution of current-based components is difficult to raise, but LCD has huge potentials in terms of resolution. Thirdly, OLED's quality is not steady for its employment of unstable chemical materials, and its luminous efficiency decays as time goes by, which is another fatal flaw. In the small and medium-sized field, Japanese vendors make

advantage of LTPS and IGZO to occupy technical high grounds, and Taiwanese vendors lead the global LCD trend with 4K for the first time.

Samsung shows over-reliance on OLED, and its LCD business has gradually crept down. It not only lags behind INNOLUX under Taiwan's Hon Hai in shipment, but also will drop behind INNOLUX in terms of revenue in 2014. As for profitability, Samsung gets into trouble as well. Being overly optimistic on the Chinese mainland market, Samsung invested heavily in China's first foreign-funded 8.5-generation line in Suzhou. However, the production line brought the huge loss of KRW86.6 billion in the first half of 2014. Besides China, Samsung also witnessed loss in its overall LCD business in Q2 2014. Samsung has revealed that it will not launch any new OLED TV, even it may quit the OLED TV field in 2015.

Unlike Japanese and South Korean vendors who represent excess dependence on large customers such as Apple and Samsung, Taiwanese vendors take the initiative to reduce dependence on a single large customer. Therefore, the performance of Taiwanese vendors fluctuates slightly and their operating margin ascends faster, whereas Japanese and South Korean vendors who master first-class technology see falling profit owing to the considerable idle capacity during low seasons but have to give up some small customers in busy seasons.

Currently, the prices of 32 to 42-inch LCD-TV panels have stabilized and tend to rise marginally before the peak season, while the prices of 42 to 65-inch LCD-TV panels follow the downward trend as LG Display and Samsung put two 8.5-generation lines into operation in the first half of 2014. In 2015, CSOT's second 8.5-generation line, Chongqing BOE's second 8.5-generation line and CEC-Panda's first 8.5-generation line will target at the 46 to 65-inch TV market, but the output will not be high in the initial stage, so they will not influence the market significantly. On the whole, China will have five 8.5-generation lines in 2015.

As China enters the aging society increasingly, the economic growth has slowed down. In this case, the TV demand will drop down undoubtedly, and serious oversupply will arise in the second half of 2015, leading to the inevitable price war. High fixed costs and depreciation charges of new production lines will seriously erode the profits of vendors.

Contents

1 INTRODUCTION TO TFT-LCD

- 1.1 TFT-LCD Structure
- 1.2 TFT-LCD Production Process
- 1.3 LTPS
- 1.4 Competition Analysis between LGZO and LTPS
- 1.5 TFT-LCD Cost Structure

2 TFT-LCD INDUSTRY CHAIN

- 2.1 Introduction to TFT-LCD Glass Substrate
- 2.2 TFT-LCD Glass Substrate Industry
- 2.3 Corning
- 2.4 Dongxu Optoelectronic
- 2.5 Introduction to Backlight Module
- 2.6 Backlight Module Cost Structure
- 2.7 Open-cell and Hinge-Up
- 2.8 Backlight Module Industry
- 2.9 Radiant Opto-Electronics
- 2.10 Coretronic
- 2.11 LCD Driver IC Market
- 2.12 LCD Driver IC Industry
- 2.13 Novatek
- 2.14 Introduction to Polarizer
- 2.15 Polarizer Market
- 2.16 Polarizer Industry

3 LCD MARKET AND INDUSTRY

- 3.1 Global Mobile Phone Market
- 3.2 Global Smartphone Market
- 3.3 Chinese Mobile Phone Market
- 3.4 Tablet PC Market
- 3.5 Laptop Computer Market
- 3.6 Desktop PC Market
- 3.7 HD and UHD Video Equipment
- 3.8 LCD-TV Market

- 3.9 LCD-TV Panel Industry
- 3.10 Status Quo of TFT-LCD Industry
- 3.11 TFT-LCD Panel Price
- 3.12 Ranking in TFT-LCD Industry

4 MAJOR TFT-LCD VENDORS

- 4.1 AUO
- 4.2 Innolux
- 4.3 LG Display
- 4.4 CEC Panda LCD Technology
- 4.5 BOE
- 4.6 CSOT
- 4.7 Sharp
- 4.8 Samsung Display
- 4.9 CPT
- 4.10 HannStar Display
- 4.11 Tianma Microelectronics
- 4.12 Japan Display

Selected Charts

SELECTED CHARTS

Structure of TFT-LCD
Color Filter Production Process
TFT Production Process
LCD Production Process
Capacity Distribution of IGZO Vendors, 2014-2016E
Global IGZO (Oxide) Production Lines
Global LCD Glass Substrate Demand, 2010-2011
Global LCD Glass Substrate Market Size, 2010-2011
Market Share of Global Major TFT-LCD Glass Substrate Vendors, 2014
Shipment of Global Major TFT-LCD Glass Substrate Vendors by Size
Corning's Revenue and Gross Margin, 2008-2014
Corning's TFT-LCD Glass Substrate Revenue and Net Income, 2009-2014
Revenue and Operating Profit of Dongxu Optoelectronic, 2008-2014
Production Lines of Dongxu Optoelectronic
Laptop Computer Display Panel-use Backlight Module Structure
Computer Display Panel Backlight Module Structure
TV Panel Backlight Module Structure
Cost Structure of Backlight Module for 13.3-inch LED Laptop Computer Display Panel
Cost Structure of Backlight Module for 18.5-inch LED Computer Display Panel
Cost Structure of Backlight Module for 42-inch LED TV Panel
Laptop Computer Case Supply Chain Management (SCM) under Hinge-up Mode
BLU under Hinge-up Mode
Open-cell Shipment Proportion, 2006-2012
Market Share of Global Major Backlight Module Vendors (by Revenue), 2012
Relationship between BLU-VS-Panel Makers
Revenue and Operating Margin of Global Major Backlight Module Vendors, 2010-2012
Revenue of Global Major Backlight Module Vendors, 2010-2012
Organization of Radiant Opto-Electronics
Revenue and Gross Margin of Radiant Opto-Electronics, 2008-2014
Monthly Revenue of Radiant Opto-Electronics, Oct 2012-Oct 2014
Production Base Distribution of Radiant Opto-Electronics
Capacity of Radiant Opto-Electronics by Factory 2012
Revenue of Radiant Opto-Electronics by Product, 2012-2014
Revenue of Radiant Opto-Electronics by Customer, 2012-2014
NB/Tablet PC BLU Monthly Shipment of Radiant Opto-Electronics, 2012-2014

Monitor BLU Monthly Shipment of Radiant Opto-Electronics, 2012-2014
TV BLU Monthly Shipment of Radiant Opto-Electronics, 2012-2014
Coretronic's Revenue and Operating Margin, 2006-2014
Coretronic's Monthly Revenue, Oct 2012-Oct 2014
Coretronic's Revenue by Business, 2010-2014
Coretronic's Quarterly BLU Shipment by Application, Q3 2013- Q3 2014
Coretronic's Quarterly BLU Revenue by Application, Q3 2013- Q3 2014
Global Display Driver IC Market Size, 2009-2016E
Global Display Driver IC Market Size by Type, 2009-2014
LCD Driver IC Industry Chain
Market Share of Major Large Area TFT-LCD Driver IC Vendors, 2014
Market Share of Major Small-Medium Area TFT-LCD Driver IC Vendors, 2014
Ranking of Global Major Driver IC Vendors by Revenue, 2010-2013
Novatek Organization Chart
Novatek's Revenue and Operating Margin, 2006-2014
Novatek's Monthly Revenue, Oct 2012-Oct 2014
Novatek's TV Driver IC Shipment, 201-2015E
Novatek's Quarterly Revenue by Product, Q1 2013-Q4 2014
Polarizer Market Size, 2011-2017E
Polarizer Market by Technology, 2013-2018E
Market Share of Major TV-use Polarizer Vendors, 2014
Market Share of Laptop-use Polarizer Vendors, 2014
Market Share of Tablet PC-use Polarizer Vendors, 2014
Market Share of Monitor-use Polarizer Vendors, 2014
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 (Thousands of Units)
Worldwide Smartphone Sales to End Users by Vendor in 2013 (Thousands of Units)
Worldwide Smartphone Sales to End Users by Operating System in 2013 (Thousands of Units)
Shipment of Global Top 13 Smartphone Vendors, 2013-2015E
China's Mobile Phone Monthly Shipment, Jan-Aug 2014
Global Tablet PC Shipment, 2011-2016E
Market Share of Major Tablet PC Brands, 2013
Output of Global Tablet PC Companies, 2012-2013
Laptop Computer Shipment, 2008-2015E
Shipment of Global Major Laptop ODMs, 2010-2013
Desktop PC Shipment, 2008-2015E
PC Shipment of Top 5 Vendors Worldwide, Q4 2013

PC Shipment of Top 5 Vendors Worldwide, 2013
HDTV and UHDTV Shipment, 2012-2016E
LCD-TV Shipment, 2012-2018E
Market Share of Global Major LCD-TV Vendors, H1 2014
Market Share of Major LCD-TV Vendors in China, H1 2014
LCD-TV Shipment by Size, 2014-2015E
Market Share of Global Major TV-use TFT-LCD Panel Vendors, 2010-2014
Market Share of Major TV-use TFT- LCD Panel Vendors in China, 2010-2014
Market Share of Major 32-inch TV-use Panel Vendors in China, 2013-2014
Monthly Total TFT -LCD Revenue and Growth, Sep 2013-Sep 2014
Monthly LCD-TV Panel Unit Shipment and Growth, Sep 2013-Sep 2014
Monthly Monitor Panel Unit Shipment and Growth, Sep 2013-Sep 2014
Monthly Laptop Panel Unit Shipment and Growth, Sep 2013-Sep 2014
Monthly Tablet PC Panel Unit Shipment and Growth, Sep 2013-Sep 2014
Monthly Price Trend of 32-, 39-, 42-, 46-inch LCD-TV Panel, May 2013-Sep 2014
Monthly Price Trend of 15.6-, 17.3-, 18.5-, 21.5-inch LCD Panel, Jan 2012-Jul 2014
Shipment and Market Share of Global Major Large-sized TFT-LCD Panel Vendors, Q2 2014
Operating Margin of Global Major Large-sized TFT-LCD Panel Vendors, 2002-2013
Ranking of Global Major TFT-LCD Panel Vendors by Revenue, 2012-2014
Operating Margin of Global Major TFT-LCD Panel Vendors, 2012-2014
AUO's Revenue and Gross Margin, 2009-2014
AUO's Revenue by Region, 2012-2013
AUO's Revenue by Application, 2012-2013
AUO's Shipment by Application, 2012-2013
Suppliers of Key Raw Materials and Components
AUO's Display Revenue Breakdown by Application, Q3 2013-Q3 2014
AUO's Display Revenue Breakdown by Size, Q3 2013-Q3 2014
AUO's Shipment and ASP, Q3 2013-Q3 2014
AUO's Small & Medium Panel Shipment by Area and Revenue, Q3 2013-Q3 2014
AUO's Production Lines
AUO's LCM Bases
INNOLUX's Revenue and Operating Margin, 2010-2014
INNOLUX's Revenue, Gross Margin, EBITDA Margin, Q4 2012-Q3 2014
INNOLUX's Total Debt and Debt Ratio, Q4 2012-Q3 2014
INNOLUX's Inventory, Q4 2012-Q3 2014
INNOLUX's Regional Shipment and TFT LCD ASP, Q4 2012-Q3 2014
INNOLUX's Small & Medium Size Unit Shipment and Sales, Q4 2012-Q3 2014
INNOLUX's Sales Breakdown by Application, Q4 2012-Q3 2014

INNOLUX's Sales Breakdown by Size, Q4 2012-Q3 2014
Profile of INNOLUX's TFT-LCD Fabs
Profile of Touch Sensor Fabs
Revenue and Operating Margin of LG Display, 2009-2015E
Quarterly Revenue and Gross Margin of LG Display, Q1 2013-Q3 2014
IFRS Statements of Financial Position of LG Display, 2012-2014
Shipment of LG Display by Application, 2009-2013
Revenue of LG Display by Application, 2009-2013
Revenue of LG Display by Region, 2011-2013
Quarterly Shipment and ASP of LG Display, Q3 2013-Q3 2014
Quarterly Revenue by Application of LG Display, Q3 2013-Q3 2014
Quarterly Production of LG Display by Region, Q3 2013-Q3 2014
Capacity of LG Display's Fabs
Capacity of LG Display's Fabs, 2011-2013
Footprint of LG Display
Manufacturing Bases of LG Display
Raw Material Procurement of Nanjing CEC Panda LCD Technology, 2013
Raw Material Suppliers of Nanjing CEC Panda LCD Technology, 2013
Top Five Customers of Nanjing CEC Panda LCD Technology, 2013
BOE's Revenue and Operating Profit, 2008-2014
BOE's MILESTONE
BOE's Manufacturing Bases
BOE's Quarterly Revenue, Q1 2010-Q3 2014
Financial Summary of BOE's Major Subsidiaries, 2013
Sharp's Revenue and Operating Margin, FY2008-FY2015
Sharp's Revenue by Business, FY2013-FY2015
Sharp's Operating Margin by Business, FY2013-FY2015
Sharp's Mobile Phone Panel Resolution, 2013-2014
Sharp's Production Lines
Revenue and Operating Margin of Samsung's DP Division, 2010-2015E
Revenue of Samsung's DP Division by Product, 2012-2015E
Revenue and Operating Profit of Samsung's DP Division, 2012-2015E
Samsung's Production Lines
CPT's Revenue and Operating Margin, 2007-2014
CPT's Production Lines
Revenue and Operating Margin of HannStar Display, 2006-2014
Base Distribution of HannStar Display
Revenue and Operating Margin of Tianma Microelectronics, 2005-2014
Production Lines of Tianma Microelectronics

Capacity, Output and Capacity Utilization of Subsidiaries of Tianma Microelectronics, 2012-2013

Customer Distribution of Tianma Microelectronics, 2012-2013

Capacity of Production Lines of Tianma Microelectronics

The JDI Group in Transition

Monthly Revenue of Star World Technology, Oct 2012-Oct 2014

I would like to order

Product name: Global and China TFT-LCD Industry Report, 2014-2015

Product link: <https://marketpublishers.com/r/GE461E7396DEN.html>

Price: US\$ 2,300.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/GE461E7396DEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970