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Global and China Touch Panel (Including Small-and Medium-sized Display) Industry Report, 2011-2012

https://marketpublishers.com/r/G47E85EB7F1EN.html
Date: June 2012
Pages: 164
Price: US$ 2,600.00 (Single User License)
ID: G47E85EB7F1EN

Abstracts

Global and China Touch Panel (Including Small- and Medium-sized Display) Industry Report, 2011-2012 conducts studies on the followings:

Downstream market of touch panel;

Touch panel & small- and medium-sized display market;

11 main small- and medium-sized display manufacturers;

18 main touch panel manufacturers;

8 touch panel peripheral manufacturers

The momentous event of the small and medium-sized display industry in 2011 was Toshiba, Hitachi and Sony, Japan's three leading TFT-LCD manufacturers, merged their small and medium-sized display business into one named Japan Display, which went into formal operation in April 2012. In the future, Panasonic's TFT-LCD business is probable to be incorporated into the company.

Squeezed by counterparts from South Korea, the Japanese LCD industry has witnessed a dramatic decline for the past few years, even the government has attempted to save it. Sharp, used to perform best, slipped as badly as 42% in 2011, and the LCD business suffered the loss for the first time over the years. Even so, Sharp was still reluctant to join Japan Display.

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Relying on OLED, Samsung Mobile Display (SMD) firmly holds the first worldwide, providing almost all world's AMOLED products. In 2011, the shipment soared to 96.4 million units and revenue harvested US$3.266 billion. SMD uses LTPS TFT-LCD to drive OLED, rendering LTPS TFT-LCD's yield even lower, which makes slow process for AMOLED since presenting itself. Through seven years of research, SMD broke through the technical threshold at the end of 2010, and then grew by leaps and bounds. Manufacturers except SMD have all abandoned LTPS TFT-LCD and geared towards Oxide TFT, which may take 4-7 years to be mass-produced, so SMD can maintain its supremacy in AMOLED at least before 2016.

Samsung mobile phones and tablet PCs massively apply AMOLED, which constitutes one of the reasons for AMOLED's take-off. Samsung cell phone had already surpassed Nokia to become the first in the world in Q1 2012. Because core components of cell phone have been as standardized as notebooks, vendors can only achieve differentiation in screen and appearance. Nearly all cell phone vendors have introduced AMOLED display phones, which further promotes the evolution of AMOLED.

For most touch panel manufacturers, 2011 is the fall, while 2012 the winter. In the second half of 2011, capacitive touch panel capacity was largely put into production, accompanied by plunged price, manufacturers except TPK and Wintek all showed decline in revenue. Entering 2012, the situation ran worse, small and medium-sized manufacturers in Taiwan all slipped between 20-40%. Even Wintek, Apple's main supplier, had its gross margin less than 1% in Q4 2011, and other peers' were mostly negative.

In 2012, the touch panel industry pattern has changed a lot, the rising of ON-CELL and IN-CELL became a challenge to traditional manufacturers. ON-CELL is used in AMOLED, and SMD, a full adopter of ON-CELL, have the touch sensor supplied by Taiwan-based CPT and HannsTouch. IN-CELL is launched by Japan Display, in all likelihood adopted by Apple's next-generation iPhone.

Compared with any existing touch panel, IN-CELL enjoys overwhelming superiority regardless of performance or cost, becoming an irresistible trend. At the present stage, it is only suitable for designs such as iPhone with large quantity shipment and single model, thus IN-CELL manufacturers have rich time to improve good yield.

In 2012, traditional touch panel manufacturers have all introduced TOC (Touch On Cover) solutions, i.e., ATT called by Wintek, TOL by TPK, WIS by Chimei Innolux and OGS by Cando, and in near future it will be embraced by a majority of cell phones.

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