

Global and China Touch Screen Industry Report, 2009-2010

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Abstracts

Touch screen manufacturers have witnessed substantial increase in revenue in 2010 owing to the following reasons: first and foremost, the shipment of smart phones and the application of touch screens even in non-smart phones have been soaring as a result of the robust demand for mobile phones. Secondly, Apple iPad introduced in 2010 adopts the top-grade touch screen which is very expensive, and the shipment of iPad in 2010 is expected to arrive at 13.80 million. Thirdly, Apple iPhone and iPad shipped in 2010 both adopt the display panel laminating touch screen with TFT panel, and the unit price covers the price of TFT panel.

The touch screen suppliers for both iPhone and iPad are TPK and Wintek. TPK went public on the Taiwan Stock Exchange at the end of October 2010, and its share surged 139% and market value broke through NT\$110 billion on its first day of trading.

As the suppliers of Samsung, LG and HTC, Young Fast Optoelectronics (YFO) and JTOUCH obtain roughly 50% and over 55% respectively of their revenue from Samsung. Transtouch Technology Inc. mainly ships products to Fujitsu. SWENC Technology is the supplier of Compal Electronics Inc., the second largest notebook OEM in the world. Sintek and Cando, formerly color filter manufacturers, devote themselves to the medium and large-sized touch screen field, and Sintek has already shipped touch screen sensor for iPad. Elo TouchSystems, a subsidiary of electronics giant TYCO, mainly engages in large-sized touch screens for non-consumer electronics fields like ATM and vending machine. EELY is a non-listed company and its major production base is located in Guangzhou. NISSHA, once the world's largest touch screen manufacturer, is still powerful.

CHIMEI possesses the most complete industrial chain and its touch screen comes from

the recently merged Innolux who acquired TPO, the major mobile phone display supplier of Nokia, so, CHIMEI will see a bright future. Truly is the largest mobile phone display manufacturer in Chinese Mainland. The South Korean manufacturer DIGITECH mainly supplies for Samsung. Starting with EL backlight business, ELK is the largest touch screen manufacturer in South Korea and primarily supplies for LG and RIM. MELFAS is a South Korean touch screen IC manufacturer, and it also manufactures touch panels by itself since touch screen IC and touch panel are generally shipped together. Its major clients include Samsung and Japanese manufacturers.

The glass-based projected capacitive touch screen, Apple's favorite, turns out to be the hottest topic in 2010. Its production involves 30~40 processes, including three thresholds. As a result, in the short run, new entrants can engage in the touch module production and lamination business step by step, but subject to the constraints of processes, it is not so easy for them to become suppliers with stable and large shipment. Nevertheless, Wintek and TPK are among the few manufacturers capable of engaging in both touch sensor and lamination businesses.

The thresholds are so high that only TPK and Wintek are qualified to become the suppliers for Apple, and even other enterprises step into this field in 2-3 years, they will only get a very small share.

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