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Research Report on China's LCD Panel Industry, 2011-2012

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Abstracts

LCD Panel is the foundation and the core of the information industry, and the basis for the development of computer, household appliance, digital electronics, automation, telecommunications, spaceflight and other industries, while its application fields cover almost all the electronic devices.

The Chinese government has carried out a series of policies to support LCD panel enterprises and achieved great progress in fiscal subsidy, land preferential policy, and elimination of backward production capability. In 2009, it was clearly announced in the Plans for Adjustment and Promotion of Electronic Information Industry approved by the State Council of the People's Republic of China to support the sixth-generation and above LCD panel projects. Key support will be given to key enterprises to construct several production lines of large-sized TFT-LCD and PDP panels and form large-scale panel production capability. Policies such as the scheme of providing household appliances to the countryside, old-for-new service and HDTV broadcast stimulate the rural consumer market and the consumption desire of urban consumers who haven't bought LCD TVs from another angle, and become another benefit for the development of China's LCD panel industry.

Almost all manufacturers of China's flat panel display (FPD) industry concentrate in the Bohai Rim Region, the Yangtze River Delta Region and the Pearl River Delta Region. Manufacturers in the Bohai Rim Region are located in Beijing as the main axis, extending to Tianjin and Dalian; those in the Yangtze River Delta Region are settled in Shanghai, Nanjing, Suzhou, Kunshan and Ningbo; those in the Pearl River Delta Region are located in Guangzhou, Shenzhen, Xiamen, Foshan and Dongguan with zonal distribution. In terms of industry chain development, the Pearl River Delta Region ranks first in China for the concentration of world's top 10 FPD manufacturers here;

manufacturers in the Yangtze River Delta Region started early with small and medium sizes, while the increase in end demand brings new development opportunities; manufacturers in the Bohai Rim Region taking Beijing as the center developed late and are experiencing the leapfrog development on the basis of the fifth-generation TFT-LCD production line.

In 2009, China imported 180 million pieces of LCD panels with the total value reaching USD 35 billion; in January-September 2010, China's import amount of LCD panels was USD 35.27 billion, increasing by 49.30% YOY. Great trade deficit illustrates the blank and backwardness of China's LCD panels. In general, the higher the generation of production lines of panel manufacturers is, the lower the cost for large-sized panel incision is, the more competitive the manufacturers are, and the higher the technology level is. The sixth-generation production line of BOE Technology Group Co., Ltd. was the mainstream in South Korea and Tainwan five years ago, where the major LCD panel suppliers concentrate. At present, the international mainstream has reached the 8.5-generation production line, while Sharp Corporation in Japan has even reached the tenth-generation production line, which means that most manufacturers with the sixth-generation production lines in South Korea and Taiwan have finished the depreciation. Against the background of annual decrease in LCD panel price of over 10%, the price competitiveness of Chinese manufacturers with the sixth-generation production lines lags far behind.

In terms of future supply of China's high-generation production lines, large-scale production capability will be formed after 2011 according to the plans of existing manufacturers. At present, China's high-generation production lines under construction include the eighth-generation production line of BOE in Beijing, the 8.5-generation production line of Feilong Electronics in Kunshan and the 8.5-generation production line of TCL and Shenchao Science and Technology Investment Co., Ltd. in Shenzhen, among which the eighth-generation production line of BOE started early and is expected to put into production firstly.

More following information can be acquired through this report:

- Status quo of China's LCD panel industry
- Influential investors for Development of China's TFT-LCD industry chain
- Import and export of China's LCD panels

Investment in China's LCD panel industry

Major enterprises of China's LCD panel industry and their operations

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