

Mobile Handsets Displays Market Tracker

Sluggish 2009 and 2010 for Mobile Display Industry Amid Deteriorating Economy

By Vinita Jakhanwal, Principal Analyst

Forecast

Frequency, Time Period

- Annual forecasts through 2010
- Rolling quarterly forecasts

Measures

- Units
- Average selling price
- Revenue

Addressing Types

- Active
- Passive

Primary/Secondary Displays

Screen Size

- <= 1.5-inch
- >1.5-inch to <=2.0-inch
- >2.0-inch to <=2.5-inch
- >2.5-inch

Pixel Format

- < 100 x 100
- Around 132 x 132 (128x128, 130x130 etc.)
- Around QCIF (132 x 176, 128 x 160 etc.)
- Around QCIF+ (176 x 240 etc)
- >=QVGA (240x320 and greater)

Technologies Covered

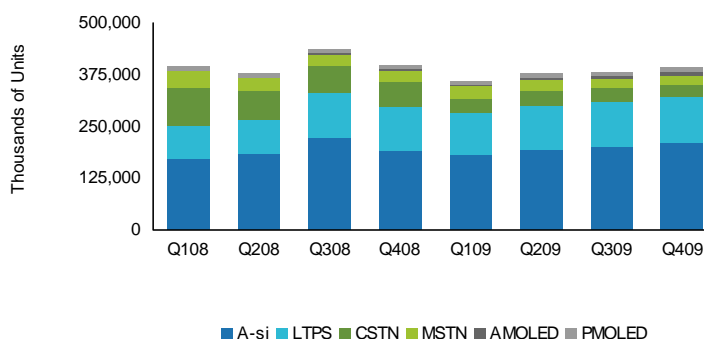
- LCD – a-si TFT, LTPS TFT, CSTN, MSTN
- OLED

iSuppli Corp. began its pioneering display industry market research practice in the 1970s with analysis of the emerging liquid crystal display (LCD) industry. At that time, most LCDs could be described as “mobile,” albeit in low-end, low value monochrome display applications such as calculators and watches.

But the explosion of the cellular phone industry combined with the rapid evolution of LCD technology has created a high-end, high value market for mobile LCDs, with millions of color and monochrome displays shipping each quarter. And, with the emergence of organic light-emitting diode (OLED) technology as an alternative to LCDs in mobile phones, a battleground is brewing that will create a dynamic market throughout the decade.

Mobile Handsets Displays Market Tracker provides a quarterly forecast of the worldwide market for mobile phone displays by technology, addressing scheme, screen size and pixel format in terms of units, value, and average selling price. The market analysis details recent product announcements, trends in other mobile phone components such as cameras, pricing trends, and important wireless industry news.

Mobile Display Unit Shipments by Technology, Q1 2008-Q4 2009



Critical Questions Answered

- What are the most common types of display size, resolution and color being used in mobile handsets today, and what will the future be?
- What is the growth forecast for high resolution displays and flip phones with two displays?
- What is the color vs. monochrome mix, and what are the trends in resolution and number of colors in mobile phone displays?
- When will OLED displays become cheaper than LCDs for mobile phones? What will happen to TFT LCD prices?
- What are the trends in technology adoption? Will we see OLEDs as main phone displays? By when will passive matrix LCDs be phased out?
- Who are and will be the key manufacturers? Will there be enough supply to meet growing demand?

Who Should Read This?

- LCD and OLED Panel and Module Manufacturers
 - Product Marketing Managers
 - Market Research Managers
- Handset Manufacturers (OEM/EMS/ODM)
 - Purchasing Managers
 - Design/Technical Managers
 - Market Research Managers
 - Competitive Intelligence Managers
- Display Component Manufacturers
 - Product Marketing Managers
 - Market Research Managers
- Service Providers
 - Strategic Purchasing Management

Lead Analyst**Vinita Jakhanwal, Principal Analyst**

Vinita brings over a decade of market research and consulting experience to iSuppli where she tracks the mobile display market along with following other small and medium-display application markets. Currently she is responsible for forecasting, competitive analysis and supply/demand research for the Mobile Displays Market Tracker and the Small/Medium Display Market Tracker.

Previously, she worked as a Senior Industry Analyst at Frost & Sullivan, where she managed research in logistics and automatic identification. Vinita also worked as a Research Analyst for McKinsey and Co., tracking a variety of industrial sectors, and has experience in corporate and investment analysis.

Vinita received a Master of Economics degree from the Delhi School of Economics, and a Bachelor of Arts in economics from the University of Delhi.

Sample Table of Contents

- Introduction
- Findings and Implications
- Market Analysis
 - Market Size – Screen Size Trends
 - Market Size – Pixel Format Trends
- LCD Mobile Handset Display Market
 - Monochrome STN-LCD Market
 - Color STN-LCD Market
 - TFT-LCD Mobile Display Market
 - OLED Market
- Price Forecast
- Near-Term Price Forecast
- Role of Taiwanese and Chinese LCD Suppliers
- Appendix A: Forecast Assumptions
- Appendix B: Definitions
- Appendix C: Research Methodology

Figures

- Mobile Handset Displays Shipment and Revenue Forecast
- Comparison
- Mobile Display Unit Shipments by Technology
- Mobile Display Value Forecast by Technology
- Mobile Display Unit Shipments by Technology
- Mobile Display Revenue Forecast by Technology
- Mobile Display ASPs by Technology
- Mobile Handset Main Display Unit Shipments by Size
- Secondary Mobile Handset Displays Unit Shipment by Technology
- Mobile Handset Displays Unit Shipment Shares by Pixel Format
- Mobile Handset Main Display Trends by Pixel Format
- Monochrome STN-LCD Mobile Display Market Value and ASPs
- Color STN-LCD Mobile Handset Display Market Value and ASPs
- Color STN-LCD Mobile Handset Display Market Share
- TFT-LCD Mobile Display Market Value and ASPs
- LTPS TFT-LCD Mobile Display Market Value and ASPs
- Mobile Handset LCD Vendor Landscape
- Mobile Handset Display Module Shipment Market Share
- Amorphous Silicon TFT-LCD Mobile Handset Panel Market Shares

- LTPS TFT-LCD Mobile Handset Panel Market Shares
- OLED Mobile Display Market Value and ASPs
- Mobile Handset Display ASPs by Technology
- Near-Term TFT-LCD Prices

Tables

- Pixel Formats and Pixel Counts Higher than QVGA
- Mobile Handsets with Higher-than-QVGA Displays
- Pixel Format Shipments by Pixel Format (%) Higher than QVGA
- Taiwan Panel Supplier Shipments to the Top 5 OEMs
- Taiwanese TFT-LCD Fabs

Appendix Tables

- Mobile Handset Shipments
- Main Display Specifications for Handsets

Database

- Actual display shipment, revenues and ASPs and forecast for the mobile phone market on the following parameters
 - Color vs Monochrome
 - Technology
 - Pixel Formats
 - Screen Sizes (including separate forecast for secondary displays)
- Market share pivot table for the LCD market
- Detailed pricing on all technologies by resolution and number of colors