

Emerging Display Technologies Special Report

Portable and Desktop Computing Systems are Ready to Feel the Touch

By Rhoda Alexander, Director

Forecast**Frequency**

- 6-year annual forecast

Measures

- Units
- Market Value
- ASPs

Regions Covered

- Worldwide

Touch Screen Technologies

- Projected Capacitive
- Surface Acoustic Wave
- IR
- Optical Imaging
- Resistive
- Surface Capacitive
- Active Digitizer
- Sensor-in-Pixel
- Other: Bending Wave, Distributed Light, 3D Touch, Laser Pointer, Force Panel, Micro Mouse and Sensor

Screen Sizes

- 5.x-9.x-inch
- 10.x-12.x-inch
- 13.x-15.x-inch
- 16.x-17.x-inch
- 18.x-19.x-inch
- 20.x-22.x-inch
- 23.x-24.x-inch
- 25.x-30.x-inch

Applications/Products Covered

- All-In-Ones
- Notebooks
- Netbooks
- Stand-Alone Monitors
- Tablets

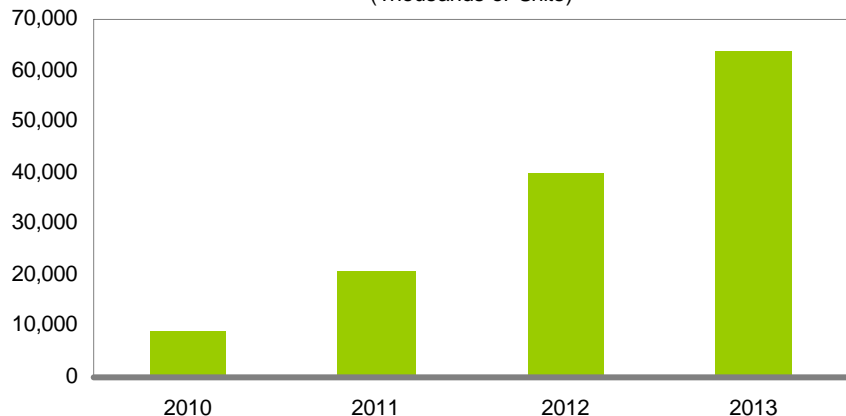
Touch screen interfaces are becoming increasingly common among portable and desktop computing systems – a trend that will only accelerate thanks to the native support for multi-touch found in Windows 7.

If your company participates anywhere along the computing or displays value chains, you need to understand exactly how touch screens may impact your market opportunity and competitive environment. This comprehensive new analysis from iSuppli can help.

In researching this report, iSuppli interviewed touch screen leaders: display designers, touch technologists, PC makers, software developers, system integrators and end-users. The input from those interviews was correlated with iSuppli's proprietary data on the compute systems market to develop realistic projections for each segment.

This unique report, written by director Rhoda Alexander, evaluates all of the major technologies and applications, from dorm rooms to boardrooms. The database includes detailed forecasts by units, ASPs, market values and screen sizes, enabling you to precisely target the segments in which you need to compete or invest.

Global Shipments of Touch Screen Systems on Slate-Type Devices
(Thousands of Units)

**Key Issues Addressed:**

- What is the market potential for touch screen displays in compute systems applications?
- Which companies are best positioned to capitalize on this opportunity?
- What are the strengths and weaknesses of key touch screen technologies?
- How is the value chain of the touch screen industry structured?

Applicable To:

- Brand manufacturers, display manufacturers, OEMs, ODMs, system integrators, software developers, semiconductor suppliers
 - Market strategy
 - Product planning
 - Product marketing
 - Business development
 - Sales
- Financial Investors
 - Equities
 - Venture capital
 - M&A

Lead Analyst**Rhoda Alexander, Director**

Rhoda Alexander has been covering the displays industry for more than 20 years. She is widely regarded as being the leading, independent analyst for desktop and specialty monitors, and her clients include virtually every major company in the monitor value chain.

Rhoda's research is comprehensive, encompassing global supply, demand, inventories, and pricing for monitor panels and systems. She tracks ODM/OEM system assembly, distribution channels and end-markets, and she continually analyzes the strategies and local marketing tactics of all leading monitor brands. She also assesses display and interface technologies to determine future adoption and penetration rates.

Rhoda's coverage extends beyond volume desktop and workstation monitors into the highly specialized markets for medical, film, broadcast, and air-traffic control. She frequently provides strategic guidance to companies wishing to enter or expand their positions in these unique market segments.

Rhoda has designed and managed a number of large-scale research projects. These span a diverse range, from support for tactical supply base management to long-range projections of monitor demand in established and emerging markets.

Table of Contents

- Introduction
- Findings and Implications
- Touch-screen Value Chain
- Touch-screen Products in the Portable and Desktop Computer Systems
- Analysis by Product and Technology
 - Slates
 - Netbooks
 - Notebooks
 - All-in-one Desktops
 - Desktop Monitors
- Touch Technologies Overview
 - Resistive
 - Projected Capacitive
 - Camera-based Optical Imaging
 - Active Digitizer
 - DuoSense
 - Surface Capacitive
 - Reversing Ramped Field Capacitive (RRFC)
 - Surface Acoustic Wave (SAW)
 - Bending Wave
 - Infrared (IR)
 - IR-based Optical
 - LCD-integrated Touch
 - In-cell Optical Touch
 - In-cell/On-cell Capacitive Touch
 - In-cell Resistive Touch
 - Force Sensing
 - Interpolating Force Sensitive Resistance (IFSR)
- Touch Technologies for Computers: Applications and Trends
- Touch-screen Materials and Coatings
 - Substrate
 - Cover Glass
 - ITO Replacement
 - Surface Treatment

Figures

- Touch-screen Industry Value Chain
- Worldwide Personal Computer Systems Touch-screen Market, Units by Technology, 2007-2014
- Worldwide Personal Computer Systems Touch-screen Market, Value by Technology 2007-2014
- Worldwide Personal Computer Systems Touch-screen Market, Units by Product, 2007-2014
- Tablet PC Market Shift, 2009 & 2010
- Touch Systems on Personal Computer Products, 2009 & 2010
- Worldwide Slate Touch-screen Market, Units by Technology, 2007-2014
- Worldwide Touch-screen Price/Volume Relationship, 5.x to 9.x-inch Slates, 2010 - 2014

- Worldwide Netbook Market by Feature Set, 2007 -2014
- enTourage eDGe 7
- Qualcomm Patented Foldable Touch-screen Concept
- Worldwide Netbook Touch-screen Market, Units by Technology, 2007-2014
- Worldwide Touch-screen Price/Volume Relationship, 10.x – to 12.x-inch Netbooks, 2007-2014
- Worldwide Notebook Market by Feature Set, 2007-2014
- Worldwide Notebook Touch-screen Market, Units by Technology, 2007-2014
- Worldwide Notebook Touch-screen Market, Units by Size, 2007-2014
- Worldwide All-in-one Market by Touch Adoption, 2007-2014
- Worldwide All-in-one Market by Touch Adoption, Units by Technology, 2007-2014
- Worldwide Touch-screen Price/Volume Relationship 20.x- to 22.x-inch All-in-ones, 2007-2014
- Worldwide All-in-one Market by Touch Adoption, Units by Size, 2007-2014
- Worldwide Desktop Monitor Market by Touch Adoption, 2007-2014
- Worldwide Desktop Monitor Market by Touch Adoption, Units by Technology, 2007-2014
- Worldwide Desktop Monitor Market by Touch Adoption, Units by Size, 2007-2014
- Analog Resistive Touch Screen Technology
- Projected Capacitive Touch-screen Technology
- Optical Imaging Touch-screen Technology
- Active Digitizer Technology
- DuoSense Touch-screen/Digitizer Technology
- Surface Capacitive Touch-screen Technology
- Reversing Ramped Field Capacitance Touch-screen Technology
- Surface Acoustic Wave Touch-panel Screen Technology
- Acoustic Pulse Recognition Touch Technology
- Infrared Touch Technology
- Digital Wave Touch Technology
- On-Cell/Out-Cell Capacitive Touch-screen
- In-Cell/On-Cell Capacitive Touch with Touch Sensor on LCD Color Filter

Table of Contents (continued)

In-Cell Capacitive Touch with Electrodes
inside LCD Cell
Conceptual illustration of Touch Detection
Based on Change in
Liquid Crystal Capacitance
Cross Section of Manufactured LCD
In-Cell Resistive Touch Technology
Touchco's Multi-touch IFSR Sensor

Tables

Comparison of Major Touch Technologies
for Computing Devices
Key Advantages and Disadvantages of
Touch Technologies
Most Relevant to Computers
Substrate Materials for Major
Commercialized Touch Technologies
Glass and PET Attribute Sets