

Display Driver ICs Market Tracker

Display Drivers Can't Avoid the Flat-Panel Wreck

By Randy Lawson, Senior Analyst

Forecast**Frequency, Time Period**

- 3-year rolling quarterly forecasts
- 5-year annual

Measures

- Unit volumes
- ASPs
- Semiconductor revenues

Regions, Markets

- Worldwide

Detail Level

- Sizes and resolutions for LCD Monitors, notebooks, LCD TVs & PDPs
- By application for Small/Medium LCD displays and OLED displays
- By resolution for handset displays

Applications/Products Covered

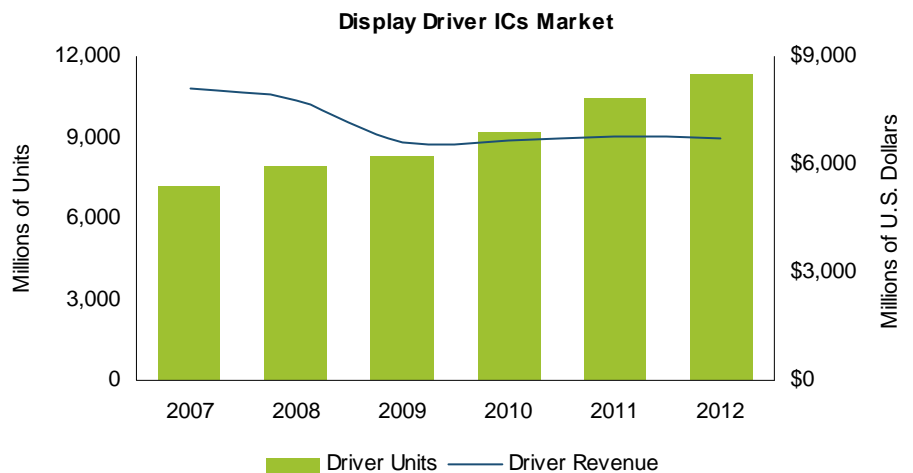
- Large LCD Displays – LCD monitor, notebooks, LCD TVs
- PDPs
- Small/Medium displays – LCD active, passive & mono, OLED

Technologies Covered

- TCONs, Row/Column drivers for LCD monitor, notebooks, LCD TVs & PDPs
- Small/Medium LCD displays
- Display interfaces (MPL, MIPI, MDDI)

The market for driver ICs for flat panel displays stage is set to decline on a revenue basis in the next few years largely due to slowing unit growth rates in large and small panel applications. Mergers, acquisitions and a trend towards focusing on specific markets and niche areas are being seen by suppliers in this very large volume IC market segment. Even as revenues decline, unit shipments will continue to see healthy growth, especially in the large panel category where increasing resolutions, screen sizes and frame rates are driving the need for more advanced driver ICs.

The Display Driver ICs Market Tracker provides a detailed analysis of the volatile market for driver ICs for all flat panel display market segments while simultaneously providing information about the companies and technologies that participate in this space. This report reviews the market and technology trends that are shaping the driver ICs and timing controllers used in small, medium and large sized displays. Driver IC revenues and shipments are provided across multiple end product categories and broken out by driver type (standard/multi-channel/color bit depth) based on a realistic model of IC consumption by panel factories in this market. This is validated by quarterly tracking of the performance of all major display driver chip companies.

**Critical Questions Answered**

- What is the market outlook for various display types (LCD monitors, notebooks, LCD & PDP TVs, OLED, Small/Medium LCD Displays) and what technology changes are occurring in each?
- Who are the key driver chip suppliers for the different market segments?
- What is the market share breakdown for display driver companies?
- What is the ASP and revenue trend for driver IC's in large and small panel applications?
- How is the shift to multi-channel changing the large LCD driver market?

Who Should Read This?

- Driver IC Suppliers, foundries, packaging and testing companies
 - Marketing
 - Planning
 - Product definition / systems engineers
- Display and system manufacturers
 - Procurement
 - Marketing
 - Product planners, systems engineers
- Investment community
 - Fund managers and investors with interest in display IC companies
 - Market analysts

Lead Analyst**Randy Lawson, Senior Analyst**

Randy comes to iSuppli with extensive industry experience in semiconductor design and applications for consumer electronics and DTV systems. He spent over 15 years with Texas Instruments in various engineering design, product definition and management roles. He began his career in display electronics design, afterwards moving to PC and CE connectivity applications and technical marketing. Randy has also been involved in both chip level and DTV systems design, helping lead teams that developed some of the first 1394 devices that supported DTCP content protection and high speed networking applications. Randy worked as a systems engineer on the recent Slim DLP program focused on both China and U.S. markets. His most recent role was as an engineering Program Manager with Texas Instruments DLP TV group.

Randy is an alumni of the University of Tennessee and holds a Bachelor of Science in Electrical Engineering.

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- Overview: What is Covered in this Market Tracker
- What's New: Recent Changes, New Information in this Report
- Key Findings and Implications

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LCD-TV Column Driver Unit Forecast – By Bit-Depth Type

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Annual Semiconductor Display Driver Revenue Market Shares, Fabless Companies

Display Driver Companies

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