

LCD Supply Chain Market Tracker

Survival of the Fittest Rules LCD Component Market Amid Further Fab Utilization Rate Cuts

By Sweta Dash, Director

Forecast

Frequency, Time Period

- Quarterly update
- Eight-quarter rolling forecast

Regions, Markets

- Analysis of major TFT-LCD Component demand by region (Taiwan, Korea, Japan, China) with output of worldwide supply/demand balance

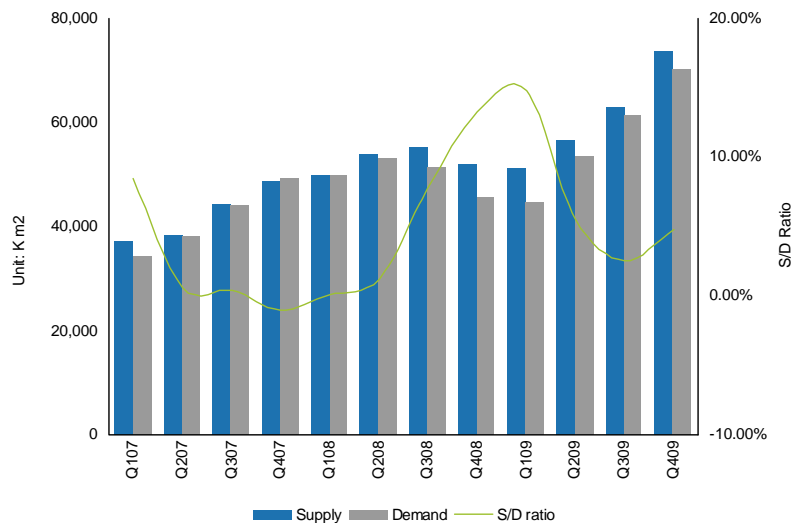
Details

- Worldwide supply of each component (Glass, Color filter, Polarizer, TAC Film, CCFL, and other critical components)
- Worldwide demand for each component (Glass, color filter, polarizer, TAC Film, CCFL, LED and other critical components)
- Estimate and forecast of production of components by generations
- Supply/demand analysis by area
- LED backlight forecast by application market (Notebooks, desktop monitors, TV and other industrial/specialty panels)

The supply disruptions in the LCD component market can greatly impact the availability of LCD panels for major application markets such as TV, monitor, and notebook computers. Advance notice of impending supply shortages or oversupply for some of those key TFT-LCD materials such as glass substrates, color filters, polarizers, TAC, CCFL and LED is critical for market players' strategic planning. In recent quarters, adoption rate of LED backlighting for large LCD panel is increasing especially for the notebook computers. iSuppli has added an LED backlight forecast for the large-LCD panel market with specific forecasts for notebook, monitor, TV, and other panel applications in the LCD supply chain report.

Furthermore, with manufacturing technology advancing, glass substrate sizes expanding, and TV demanding more sophisticated technical specifications, there is a need for tighter integration and control over critical component such as glass, color filters and other supplies. LCD panel suppliers are producing more of these parts in-house, and sometimes investing in the component companies in order to assure supply of critical components. These trends will have significant impact on the supply chain.

Worldwide TFT-LCD Glass Substrate Supply/Demand, Q107 – Q409



Critical Questions Answered

- Who are the leading suppliers for various components?
- What are the near term supply/demand balance for each component (glass, color filter, polarizers, backlight and other critical components)?
- What is the current and future capacity for each critical component?
- What are the regional supply demand trends for each component?
- What are the market shares for top component suppliers? What are their plans for capacity expansions?
- What is the LED backlight adoption rate forecast for TV, monitor and notebook computers?

Who Should Read This?

- Brand manufacturers/OEM/ODM for TV/monitor/notebook
 - Product planning managers for system sales
 - Procurement managers for LCD components
- LCD panel suppliers
 - Product marketing / strategic planning managers for LCD panels
- LCD component suppliers
- Investment community
 - Fund managers / investors / analysts with interest in display companies

Lead Analyst**Sweta Dash, Director**

Sweta is a well-respected industry analyst covering the LCD and projection display industries since early 1990s. She has more than fifteen years of experience tracking electronic display, semiconductor, and computer markets.

At iSuppli, Sweta is the research director and lead analyst for LCD and projection display market reports and services. Her scope of research includes data analysis, market forecasting, and predicting future market and technology trends.

Sweta is the author of numerous papers and she has spoken extensively at various industry conferences. She has a Bachelor of Arts degree with honors and Master of Arts degree in Economics from University of Toronto, Canada.

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- Glass - Supply/Demand Analysis
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LED Backlight

- LED Backlight Demand