

# AMOLED SHADOW MASK TECHNOLOGY & MARKET–2017

Jerry Kang, Senior Principal Analyst – OLED & Emerging Display Technology / June 2017

## ACTUALS AND FORECAST

### Frequency, Time Period

- 3-year annual historical (2014 – 2016)
- 6-year annual forecast (2017 - 2022)

### Measures

- Shipment (Thousands of sheets)
- Revenues (Millions of Dollars)
- Area (Thousands of square meters)
- Average Selling Price (Dollars)

### Regions, Markets

- APAC (China, Japan, Korea, Taiwan)

### Market share analysis for each major:

- Panel Supplier
- TFT & OLED Generation
- EML Structure

## TECHNOLOGIES COVERED

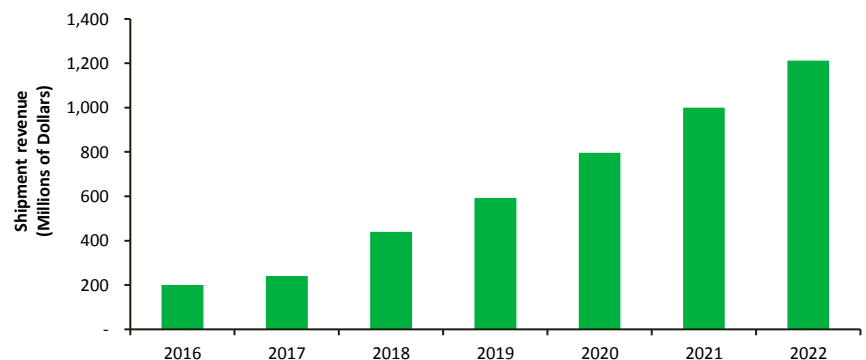
- Fine Metal Mask for AMOLED
- Open Mask for AMOLED

## AMOLED SHADOW MASK MARKET WILL GROW UP TO \$1.2 BILLION BY 2022.

Shadow Mask is the one of most important factors for patterning AMOLED pixels, and it is getting more important as the panel resolution & fab generation rises. Panel makers usually have a main supplier of fine metal mask, and they are also evaluating the second supplier's for increasing PPI.

Currently, DNP is the strongest supplier of FMM and has supplied them to SDC since 2010. SDC has improved the cleaning & recycling FMM of FHD & less. SDC is focusing on QHD FMM rather than FHD & less, and will impact the shipment of FMM. So, AMOLED shadow mask market is expected to show the different status by resolution & panel supplier.

### AMOLED SHADOW MASK REVENUE FORECAST



### Key Issues Addressed

- Which suppliers are being focused in this industry?
- How are the status of each suppliers?
- How does the manufacturing process flow?
- What is the critical point of each process?
- How are the status of each AMOLED panel makers?
- How much can AMOLED shadow mask market grow?
- How much will the capacity of AMOLED be increased?

### Applicable To

#### Strategy Planning

- OLED Supply Chains

#### Display Application Set Makers

- OEM, ODM, EMS
- Mobile Operators

#### Financial Investors

- Fund Managers & Investor Companies
- Analysts with interest in Display Industries

## LEAD ANALYST

### **Jerry Kang – Senior Principal Analyst, OLED & Emerging Display Technology**

Jerry Kang is responsible for the OLED display market analysis at IHS. His main focus is the AMOLED panel and the next generation display market including flexible and transparent display with AMOLED. With more than 10 years of industry experience, Jerry is known for his professional analysis and strategic insights on the technology and market for OLED display. He is frequently quoted in media, and is invited to speak at major conferences worldwide.

Prior to joining IHS in 2011, Jerry worked as an OLED development engineer for Samsung SDI and Samsung Mobile Display for almost six years, in charge of operational circuit designing for OLED and LCD. He also worked as a researcher at the Media & Broadcasting System.

Jerry received a Bachelor of Science degree in Electronics Engineering from Pusan National University.

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