

Automotive Display Market Tracker-2017

Hiroshi Hayase, Sr. Director; Stacy Wu, Principal Analyst – May 2017

This quarterly report provides in-depth analysis on the automotive display panel module market shipments, technology trends and value chain dynamics. It covers both automotive product displays, which includes passive type displays, such as STN, TN-LCD, VA-LCD, PMOLED, and the automobile monitor market, which includes active-type display, namely TFT-LCD and AMOLED.

This report has three major parts. The first part provides fundamental market information and covers shipment, revenue, ASP, area and forecast by application, technology, size, resolution, etc. The second part is automotive display market key trend analysis and the topic is varied every quarter. The topics can be ranged from automotive display panel technology trends, display panel supplier business analysis, and automotive display supply chain analysis, etc. The third part is the sharing of our insights into recent automotive shows, display exhibitions, and automotive display related events.

This service includes access to an excel database for shipment & forecast, an excel database for value chain, and a PowerPoint presentation.

ACTUALS AND FORECAST

Frequency, Time Period

- Quarterly
- 2-Year historical
- Current year
- 4 year quarterly forecasts
- 6 year forecasts

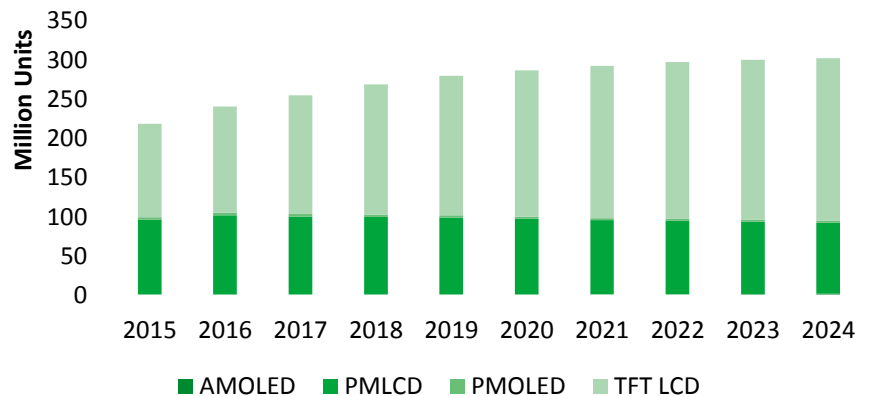
Measures

- Shipment : units / value / area / ASP / applications
- Market Share : Unit & Area
Supplier to OEM supply chain:
Applications

Sub-Measures

- Master Technologies: AMOLED/ PMLCD/ PMOLED/ TFT LCD
- Display Technologies: a-Si/ CSTN/ LTPS/ MSTN/ PMOLED/ TN/ VA
- Touch specification: TP bound, in-cell, on-cell (from 1Q'17)
- Application
 - Automotive
 - Head Up Display
 - Instrument Cluster
 - Center Stack Display
 - Rear Seat Entertainment Display
 - Rear View Mirror Display
 - Other Monitors
 - Portable Navigation Device
- Size
- Resolution
- Panel Maker
- Region
- Region of panel production based on panel supplier's region

Automotive display shipments by technology



Key Issues Addressed

- What are the actual panel shipments and expected demands for automotive display applications?
- Which automotive display application and display size dominate the market?
- What factors are impacting automotive display demand by size, and what will drive future demands?
- Which suppliers dominate the market, and what are their unit shipment shares?
- Who are the main customers in automotive display supply chain?

Applicable To

- Vehicle manufacturers: design engineers for competitive analysis, Product managers
- Tier 1 system integrators: product planning managers for system sales; procurement managers for displays
- LCD panel suppliers: product marketing/strategic planning managers
- LCD component suppliers
- Investment community: fund managers / investors / analysts with interest in display companies

LEAD ANALYST

Hiroshi Hayase - Senior Director

Mr. Hiroshi Hayase is a Director of Analysis & Research within the IHS Technology group.

He joined IHS in November 2014, when IHS acquired DisplaySearch, a leader in primary research and forecasting on the global display market. With nearly 30 years of experience in the LCD industry, he brings an unparalleled focus to sales, marketing management, production, product engineering and market research and analysis.

At DisplaySearch, Mr. Hayase served as vice president of small and medium displays. Before that, he was responsible for sales and market research at a Taiwanese LCD panel/module manufacturer, Wintek Japan Corporation. Earlier, he served as sales manager with Applied Komatsu Technology (AKT), where he was responsible for sales of CVD systems to major Japanese panel producers. He also has 13 years of experience in sales management and production engineering across the full range of LCD production processes with Seiko Epson. Mr. Hayase holds a bachelor's degree in Mechanical Engineering from Shizuoka University, Japan.

Stacy Wu—Principal Analyst

Stacy Wu is the principal analyst in the small medium display team at IHS Technology. She primarily focus on automotive, commercial and industrial displays. She is also responsible for small and medium display market survey for Taiwanese makers.

With more than 10 years of experience in display industry market research, she is knowledgeable about display industry development trend watch, suppliers' competitive analysis, and technology trend analysis. She has built solid and comprehensive display industry connections and networks from display component makers, panel suppliers, system integrators, and brands.

Prior to her role, Stacy was the senior analyst for large area display research. Before joining IHS, Stacy was the section manager of market intelligence in Delta Electronic corporate marketing team and a market analyst in Philip Multi Media Display.

She holds MSc in International Marketing from University of Strathclyde (UK) and Bachelor of Business Administration from National Chengchi University (Taiwan).

Table of Contents

Executive Summary

Part I: Total Automotive Display Market Shipment Results and Forecasts

- Instrument Cluster Display
- Head Up Display
- Center Stack Display
- Rear Seat Entertainment Display
- Rear View Mirror Display
- Other Monitor Display
- Whom supplies whom: supply chain review

Part II: Automotive Display Market Dynamic (topics are subject to be changed)

- 1Q'17: 2017 Geneva Auto Show highlights
- 2Q'17: 2017 Shanghai auto show and SID highlights
- 3Q'17: 2017 Touch Taiwan, 2017 SID Vehicle highlights
- 4Q'17: 2018 CES and Japan auto show highlights

Part II: Automotive Display Panel Market Trend Analysis (topics are subject to be changed)

- 1Q'17: Automotive display application long term forecast
- 2Q'17: Automotive display technology development and roadmap
- 3Q'17: Top 10 automotive display tier one profiles
- 4Q'17: Top 10 Automotive Display Panel Supplier Strategy Analysis

Appendix

- Light vehicle production forecast by region
- Display system production forecast by application
- Real GDP forecast

Methodology

- Research scope and coverage
- Definitions and abbreviations
- Classification of car navigation and portable navigation devices
- Research process

For more information technology.ihs.com

WORLDWIDE

T +1 844 301 7334

E technology_us@ihsmarkit.com
technology_apac@ihsmarkit.com
technology_emea@ihsmarkit.com

About IHS Markit

IHS Markit (Nasdaq: INFO) is a world leader in critical information, analytics and solutions for the major industries and markets that drive economies worldwide. The company delivers next-generation information, analytics and solutions to customers in business, finance and government, improving their operational efficiency and providing deep insights that lead to well-informed, confident decisions. IHS Markit has more than 50,000 key business and government customers, including 85 percent of the Fortune Global 500 and the world's leading financial institutions. Headquartered in London, IHS Markit is committed to sustainable, profitable growth.