

# Display Optical Film Market Tracker

Irene Heo, Principal Analyst

## ACTUALS AND FORECAST

### Frequency, Time Period

- Quarterly update

### Measures

- Area
- Revenue
- Unit
- Typical selling price

## DATA COVERED

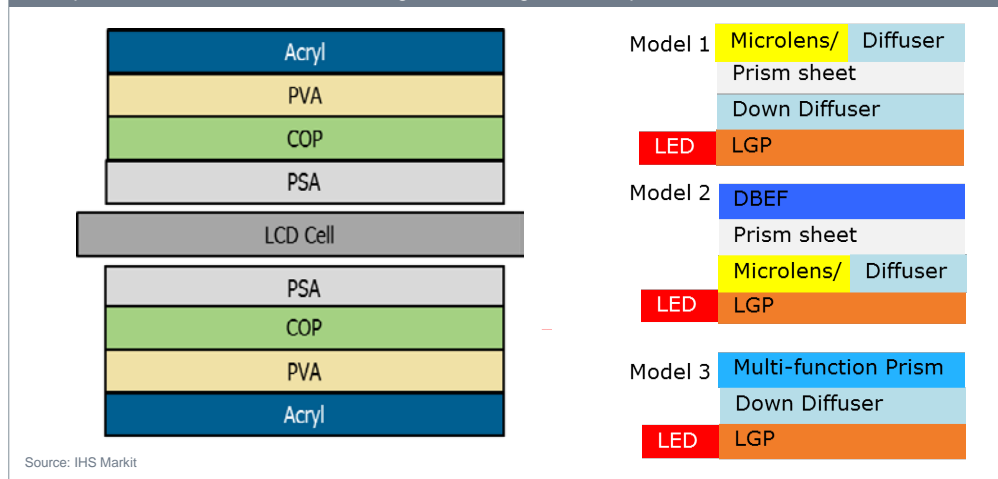
- Polarizer production capacity
- Polarizer market forecast (revenue, area)
- Polarizer pricing
- TFT LCD polarizer supply/demand
- Large-area LCD polarizer supply chain share (unit, area)
- Status of major polarizer companies
- Polarizer and sub film structure trends
- PVA protection film (TAC/Acryl/COP) demand forecast (revenue, area)
- PVA protection film capacity
- PVA protection film supply/demand trends
- PVA protection film pricing
- Compensation film demand forecast
- Compensation film supply chain share
- Optical film revenue demand forecast
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- Optical film pricing
- Backlight optical film demand forecast
  - Reflective polarizer
  - Normal prism
  - Multi-function prism
  - Diffuser
  - Reflector
  - Microlens
- Backlight optical films price trends
  - Reflective polarizer
  - Prism
  - Diffuser
  - Reflector
  - Microlens

The Display Optical Film Market Tracker covers polarizer and backlight-related films for TFT LCDs, including PVA, production film, COP, PSA, diffuser, reflector, light guide plate, microlens film, BEF/DBEF, prism sheet, and multi-functional film.

The report presents information regarding shipments, market share, capacity changes, value chain relationships between the film suppliers and panel makers, prices, supply/demand, revenue, technology development, and cost reduction efforts. Also included are area demand forecasts, revenue demand forecasts, market share analyses, and a price and cost analyses.

The Display Optical Film Market Tracker is published through an Excel data file and PowerPoint report.

New polarizer structure and LCD TV edge LED backlight model optical film structure



## Key Issues Addressed

- Discover the latest technology and supply chain information as well as pricing and forecasts for the entire range of TFT LCD optical films.
- Understand improvements in display performance derived from optical films.
- Learn about different optical film configurations and stacks found in production today
- Gain a single source of optical film information for supply/demand, supplier performance and capacity, price trends, cost structures, revenue, and market share.

## Applicable To

- Brand manufacturers/OEMs/ODMs
  - LCD and materials/components procurement division
- Suppliers
  - Optical film
  - Polarizer
  - Backlight
- LCD Panel suppliers
  - Materials/components Procurement division
  - Panel development division
- Investment Community
  - Fund managers / investors / analysts with interest in display companies

## LEAD ANALYST

### Irene Heo, Principal Analyst

Irene Heo is responsible for display industry and technology research at IHS Technology, particularly for display components and materials. Her primary focus is the optical film and touch panel industries.

Irene joined IHS in 2005 and has been following display industry parts and materials for more than eight years. In 2007, she worked in the Yokohama office for a year. The contacts she made while in Japan have become a significant resource for her optical film-related research.

Prior to joining IHS, she worked in the liquid crystal synthesis division of Dongjin Semichem Co., an electrical material company.

Irene received a bachelor's degree in chemistry and a master's degree in organic chemistry from Konkuk University.

## CONTRIBUTING ANALYSTS

### Tadashi Uno, Senior Analyst

### Jimmy Kim, Principal Analyst

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- Major polarizer companies' status – Nitto, Sumitomo Chemical, LG Chem, Samsung SDI, Sanritz, BenQ Materials, CMMT, others

Polarizer supply chain: overall, notebook, monitor, TV, tablet PC

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  - o One polarizer

### Backlight optical films

Prism film and multi-function prism

Micro lens film

Reflective polarizers and functional films

Film stack by application: notebook PC, monitor, TV

Price trends: prism film, micro lens film, reflective polarizer

Prism film supply chain: mobile PC, monitor, TV

BLU cost structure: smartphone, tablet PC, notebook PC, TV

Diffuser film

- Price trends
- Supply chain for mobile PC
- Supply chain for monitor
- Supply chain for TV

Reflector film

- Price trends
- Supply chain for notebook PC
- Supply chain for monitor
- Supply chain for TV

Light guide plate (LGP)

- TFT LCD LGP demand (mobile PC, monitor, TV)
- PMMA demand for TFT LCD LGPs
- PMMA supply/demand for TFT LCD LGP

For more information [ihsmarket.com/technology](https://www.ihsmarket.com/technology)

## About IHS Markit

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