

Automotive Display Market Tracker 2019

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ACTUALS AND FORECAST

Frequency, Time Period

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

Measures

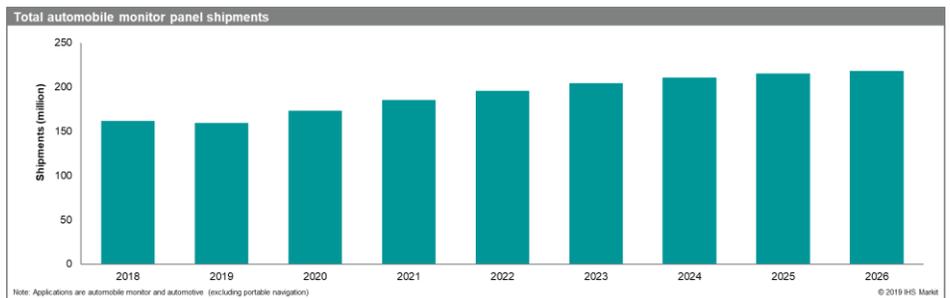
- Shipment: units / value / area / ASP / applications
- Market Share: Unit & area
 - Supplier to OEM supply chain: Applications

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
- Applications
 - 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

This quarterly report provides in-depth analysis on the automotive display application market, supplier's business competitive landscape and tier one/car OEM supply chain dynamics. The application market analysis includes short-term and long-term shipment, revenue, ASP, area by applications (instrument cluster display, center stack display, head up display, eMirror display, and aftermarket), by technology (a-Si LCD, LTPS LCD, rigid/flexible OLED, micro-LED, PM-OLED, and PM-LCD), by size, by resolution, by panel suppliers, etc. The suppliers' business competitive landscape analysis is having top suppliers' business status review and outlook, capacity allocation strategies, customers, and technology development directions, etc. The supply chain dynamics are focusing on major tier one's supply chain and sourcing strategies analysis and major automotive display related tradeshow highlights.

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



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 ANALYSTS

Hiroshi Hayase - Senior Director

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

He joined IHS Markit 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 Markit. 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).

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- Whom supplies whom: supply chain review

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- Alpine
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- Continental Automotive
- Denso
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- Visteon

Panel Suppliers' Competitive Landscape Analysis (semi-annually update)

- Corporate financial performance
- Business performance
- Product portfolio
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- Capacity and technology strategies

Panel supplier automotive business review (quarterly update)

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- Key tradeshow at the research period

Methodology

- Research scope and coverage
- Definitions and abbreviations
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- Research process

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