

FLAT PANEL DISPLAY MATERIALS 2008

Trends And Forecasts



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Overview of Research Conducted for This Report

1. Research title

Flat Panel Display Materials: Trends and Forecasts (2008)

2. Research background and objective

The objective of this report is to conduct worldwide surveys and analyses of the market-scale trends, market share, regional production trends, and new technology developments of LCD, PDP, OLED, and other display related materials, and to clarify the current state and future outlook of the market for electronic display related parts and materials.

3. Scope of the research

- 1) LCD related parts and materials 30 items
 - 2) PDP related parts and materials 11 items
 - 3) Organic EL related parts and materials 8 items
 - 4) Other display related parts and materials 8 items
- Total of 57 parts and materials

4. Research method

Use of interviews conducted by Fuji Chimera Research personnel, and of related documents and databases

5. Research period

June 2007 through August 2007

6. Exchange rate

The following exchange rates were used in this report.

FY	2005	2006	Beyond 2007
Yen/USD	109.24	116.25	119.0

7. Some notes regarding terminology used in this report

Term Definition

LPS/LTPS	Low-temperature polysilicon (TFT)
HPS/HTPS	High-temperature polysilicon (TFT)
a-Si/AMS	Amorphous silicon (TFT)
AM-OLED/PM-OLED	Active Matrix Organic EL/Passive Matrix Organic EL
CRT	Cathode Ray Tube
CDT	Color Data Tube (mainly used in PC monitors)
CPT	Color Picture Tube (mainly used in color TVs)
BL	Backlight
CF	Color filter
In/ ”	Inch (1 inch = 25.4mm)
0.x – 3.x in / 4 >	x is any real number (less than 4 inches)
2007/Q1	First quarter of 2007 (January to March 2007)
2007/H1	First quarter of 2007 (January to June 2006)
CAGR	Compound Annual Growth Rate
G5 / G6 / G7	5th-Generation, 6th-generation, 7-th generation (TFT line size)
K (sheets)	1,000 sheets
Some synonymous company names	Toshiba Matsushita Display Technology (TMD), Samsung Electronics (SEC or SSE), LG.Philips LCD (LPL), Samsung SDI (SDI), HannStar (HSD), Chi Mei (CMO)

8. Research Planning, Survey, and Editing

Research Planning, Survey, and Editing of Report by

C & E Research Section, First R&D Division, Fuji Chimera Research Institute, Inc.

Notes

1. Unless otherwise noted, the monetary units for these countries mentioned in this publication were not converted to U.S. dollars.
2. An asterisk or hyphen in the table denotes data not available.
3. A triangle in the table denotes insignificant figures.
4. This translation is faithful to the original text, and InterLingua.Com, Inc. shall not be liable for any errors that may appear in the content.

About this publication

This report is part of InterLingua's ongoing commitment to bringing the latest information on the Asian flat panel display industry to U.S. and European companies. InterLingua's collection of reports, articles, technical papers, etc. are accessible via the World Wide Web: <http://FPDonline.com>

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About this publication

The translation of this report was conducted with the support of ARL (Agreement number MDA972-93-2-0014) and the active support and involvement of the United States Display Consortium (USDC). In accordance to USDC's mission and objectives, USDC member companies are provided InterLingua translations of FPD journals and newsletters on a regular basis.

Mission

Established in July 1993, the United States Display Consortium (USDC) is a public/private consortium whose mission is to support member companies and affiliates to build a world-class, competitive U.S.-based display industry. USDC serves as a common, neutral forum to identify issues critical to the industry as well as to develop plans and specifications for, and to fund the development of, the next generation of FPD equipment and materials.

USDC Objectives Include:

Supplier Quality

Develop a viable U.S. supplier base capable of meeting worldwide requirements for current and next-generation manufacturing processes, including materials, manufacturing systems and equipment for each key module.

Integration of Advanced Manufacturing Capability Into U.S. Production Facilities

Direct the process of providing materials, manufacturing systems and key equipment modules for members to integrated manufacturing, mechanical and electrical interfaces, and common processing steps and tools.

Standard and Benchmarks

Drive the development of industry standards for procurement specifications, computer integrated manufacturing, mechanical and electrical interfaces, and common processing steps and tools.

Results Dissemination

Provide and maintain open forums for communications, collaborations, consensus building and technology transfer within the domestic high-definition display industry.

Coordinate R&D Programs Among USDC Members

- Drive the development of high-yield, high-throughput and low-cost FPD manufacturing processes
- Leverage member resources and expertise to maximize output and avoid duplication of effort
- Maintain a focus on market and end-product requirements and related FPD manufacturability issues

Direct Administration of Funds to Suppliers With Special Attention Given to:

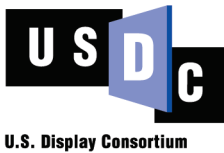
- Improved process yields
- Minimizing cost of ownership
- Innovative manufacturing approaches for new display technologies
- Manufacturing flexibility for multiple FPD technologies and applications
- Technical, financial and management strengths of the supplier

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