

DSCC Releases Quarterly OLED Supply/Demand and Capital Spending Report and Model

Massive Growth Predicted

AUSTIN, TEXAS, USA, January 10, 2017 /EINPresswire.com/ -- Display Supply Chain Consultants ([DSCC](#)) has released a new quarterly report on OLED supply, OLED demand and the OLED equipment market. Highlights from this report include:



- All OLED fab investments by phase
 - o 62 different phases of OLED fab capacity investments from 2016 to 2021.

- OLED fab capacity expressed on an input and output basis
 - o OLED input capacity is expected to rise at a 52% CAGR from 7.5M m2 in 2016 to 40.4M m2 in 2021.
 - o Mobile displays are expected to account for at least a 71% share of OLED input capacity each year.
 - o Apple's iPhone is expected to account for 20% - 35% of mobile input capacity annually from 2017.
 - o Most of the mobile capacity investments will be for flexible displays. 21 of 26 mobile OLED fab investments in 2016 and 2017 will have at least some flexible OLED capacity. As a result, flexible mobile OLED capacity will overtake rigid capacity in Q4'17 on an input basis and Q1'18 on an output basis.
 - o OLED TV capacity is expected to rise at a 52% CAGR on an input basis and 46% on an output basis in 55" equivalents to 8.4M 55" panels in 2021.
 - o Korea is expected to account for the highest share of capacity through the forecast, but falling from 92% in 2016 to 63% in 2021.
 - o China's OLED capacity is expected to rise at a 135% CAGR with its share rising from 6% in 2016 to 32% in 2021.

- OLED Demand:
 - o OLED panel shipments are expected to rise at a 36% CAGR from 389M in 2016 to 1.34B in 2021.
 - o Mobile displays are expected to account for at least a 99% share of OLED shipments each year.
 - o VR and Smart Watches are expected to be the #2 and #3 applications on a unit basis depending on the year.
 - o OLED TVs are expected to rise at a 66% CAGR and reach nearly 7M units in 2021.
 - o OLED smartphone shipments are expected to rise at a 35% CAGR and should overtake LCDs in the smartphone market in 2019. OLED smartphone shipments should exceed one billion in 2020.
 - o LCD smartphones are projected to fall at an 11% CAGR from 1.2B units in 2016 to under 750M in 2021.

- OLED Supply/Demand

- o This report includes 10 different scenarios for OLED supply and OLED supply/demand which factors in conservative and aggressive capacity investments and different timing for flexible, foldable and rollable capacity.
- o With OLED capacity tight in 2016 and Apple and Samsung expected to consume most of the OLED supply growth in 2017 and 2018 as they transition to all OLED smartphones, the OLED supply/demand situation is expected to remain tight through 2019.
- o DSCC doesn't see the opportunity for much of an OLED surplus until 2020, which is expected to be just 6%. In 2021, the surplus is expected to range from 6% in our conservative supply scenario to 12% in our aggressive supply scenario.

- OLED Deposition Market

- o This is the first report that not only provides OLED deposition shipments, revenues and ASPs, but also provides quarterly market share by supplier and design wins at each OLED manufacturer.
- o On a revenue basis, the OLED deposition market is expected to rise 140% in 2016 to \$1.2B and more than double in 2017 to \$2.65B, peak in 2018 at \$3.3B before falling 18% in 2019 to \$2.7B. Q2'18 is projected to be the first \$1B quarter for OLED deposition.
- o Fine Metal Mask (FMM) systems are expected to dominate the VTE market, accounting for an 85% - 100% share depending on the year or \$9.5B from 2016 to 2021 making it the largest segment of the FPD equipment market.
- o ½ 6G systems are expected to be the dominant OLED motherglass size, rising from 0% of 2015 shipments to 89% of 2019 shipments.
- o Korea is expected to be the largest market for OLED deposition systems in 2016 and 2017 with China leading in 2015, 2018 and 2019. From 2015- 2019 on a revenue basis, Korea is expected to lead with a slight 47% to 45% advantage.
- o SDC is expected to be the leading customer from 2015 to 2018. LGE is expected to be #2 or tied for #2 from 2016 – 2018 and lead in 2019. From 2015 to 2019, SDC is expected to lead with a 30% share, spending over \$3B. LGD is expected to spend \$1.7B and a 16% share followed by BOE with \$1.3B and a 13% share.
- o Tokki is expected to lead the OLED deposition market each year on a unit basis with its share increasing from 40% in 2015 to 57% in 2016 and 65% in 2017. With SDC ramping, Tokki is expected to lead each quarter from Q3'16 – Q4'17. Tokki's share is lower on a revenue basis due to panel manufacturers' choosing different source suppliers.

This highly informative, quarterly report features ~150 PPT slides, two Excel Pivot table files and three other Excel files. According to DSCC Asia President Yoshio Tamura, "This report is extremely useful to anyone tracking the OLED market. It provides valuable insight into every OLED fab investment, forecasts Apple and Samsung's supply and demand situation and provides 10 different scenarios for OLED supply/demand factoring in the impact of lower yielding and larger display foldable and rollable capacity. It indicates when different tiers of manufacturers are likely to start foldable and rollable production. The report also comes with an optional model that allows the user to manipulate the 10 different pre-set supply scenarios, develop their own supply scenario that changes the timing for flexible, foldable or rollable production, etc.

Report pricing starts at \$8995. For more information on the [Quarterly OLED Supply/Demand and Capital Spending Report](#) and Model, please contact info@displaysupplychain.com or call (512) 577-3672.

Ross Young
Display Supply Chain Consultants
512-577-3672
email us here

This press release can be viewed online at: <http://www.einpresswire.com>

Disclaimer: If you have any questions regarding information in this press release please contact the company listed in the press release. Please do not contact EIN Presswire. We will be unable to assist you with your inquiry. EIN Presswire disclaims any content contained in these releases.

© 1995-2017 IPD Group, Inc. All Right Reserved.