

About Us

Yano Research Institute was founded in 1958 as a very first private marketing research firm in Japan. Since then, we have been contributing to the growth of various industries by providing our clients with high quality, reliable marketing intelligence and consulting services.

One of our outstanding strength is the ability and expertise in primary field researches that have been continuously reinforced for these years. Over 150 specialized and expert researchers are on the road, interviewing and discussing with key personnel in their fields of expertise covering virtually every segments in Japanese business realm.

Another strength and feature of Yano Research Institute is based on our management concept and derived from the fact that we are independent and do not belong to any major corporate group, which assure our free access to any business entities of any group and independence from any speculative bias of any particular business or organization.

As one of the largest and most established marketing research and consulting firms in Japan, Yano Research Institute is ready to provide you with the business intelligence and consulting services you may require in making difficult decisions and navigating your business in the world of uncertainty.

Please visit www.yanoresearch.com for more details

Order Information

To place an order online, please visit our website at www.yanoresearch.com and search for the report title or the report code number (C53113200).

■ For inquiries

1. Call us at **+81-3-5371-6907** (English/Japanese bilingual) or
2. Contact us via "contact form" at: www.yanoresearch.com/contact/

Supplied in PDF via E-mail

The report (in PDF file) shall be delivered to you via e-mail by the end of the same working day or the next working day at latest after we have received your order (with credit card payment). For purchase with wire transfer of the money, we will send the e-mail (with PDF file of the report attached) as soon as we have confirmed your payment for the report at our end.

Payments:

Major credit cards accepted for orders made online at www.yanoresearch.com. If you wish to make payment via wire transfer, the fund should be transferred to our bank account. We will notify you of account information and other necessary information on the procedure via e-mail shortly after we have received your order (with wire transfer option).

Now available!

Limited edition

HIGH-PERFORMANCE FILM MARKET 2011

-Market Prospects and Strategies-

Film manufacturers must search for new usage and dormant needs on their own. Hands-on information gathering & maximizing in-house technologies lead to cultivating new markets and applications.

- The axis of competition among polarizer manufacturers is shifting from "monozukuri (product creation)" to "systemization (system creation)".
- In China's new panel market, Korean and Taiwanese manufactures compete while Japanese manufacturers in considering profitability may calmly wait and see.
- Both "iPad" & "iPhone4" had IPS installed and were highly recognized. IPS is expected to be applied more and more in other models and products.
- Tac film market; HYOSUNG & TacBright Optronics come on board in 2010.
- Hard coat film for resistive touch panels increased slightly while demand for film sensors grew with the need for lightweighting capacitive Touch Panels.
- Need for hard coat film that makes the ITO pattern less visible in capacitive touch panels.
- If the use of resin for cover glass becomes more active, it is possible that demand for anti-shatter films will plunge.
- PET film market; must unearth and develop invisible, dormant needs to identify "the next" applications and markets following optics.

Research conducted and edited by Chemicals and Materials team, Yano Research Institute Ltd. (Chemicals, Materials & Electronics, Optics)

* * * Report specifications and contacts * * *

Report specifications

Report format: 107 pages in A4 format (supplied in PDF File)

Issue date: September 22, 2011

Language: English

Price: 200,000 JPY

5% of consumption tax (or 10,000 JPY) will be added for shipments within Japan.

Orders & inquiries

To place an order: Visit our website (www.yanoresearch.com) for online purchase

Inquiry: International Business Development

Phone: +81-3-5371-6907

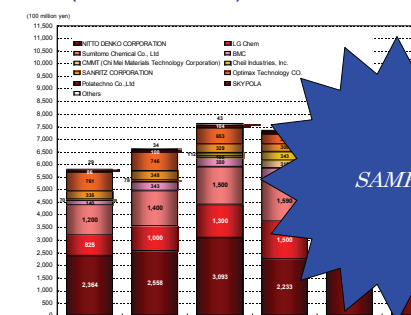
Fax: +81-3-5371-6965

WEB: www.yanoresearch.com/contact/

If you do not wish to receive further announcements from Yano Research Institute, please contact us via www.yanoresearch.com.

Yano Research Institute Ltd.
2-46-2 Honcho, Nakano-ku, Tokyo 164-8620, Japan
URL: <http://www.yanoresearch.com/>

1-1-1. Annual Sales of Polarizer Manufacturers (Polarizer Business)



1-3-20. Status of Component Manufacturers for iPad

Status of Component Manufacturers for iPad (2010)	
9.7" Panel IPS	share
LGD	SAMPLE
Samsung Electronics Co. Ltd.	SAMPLE
Seiko Epson Corp.	SAMPLE

Leading Manufacturers of PET Films

Company	2010	2011 (estimate)	2012 (forecast)
...

1-2-5. Sales Volumes and Shares of Manufacturers of Polarizers for 3D Glasses

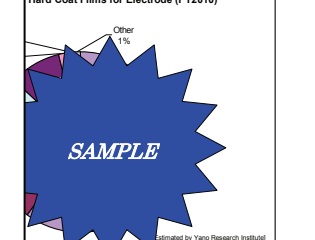
Manufacturers	2008	2009	2010
Polaroid Co. Ltd.	54	47%	12
...

Demand for Hard Coat Films as Icon Sheets Declined Temporarily Though Films are Used Also in Capacitive Touch Panels

With the Shift to Make the Cover Glass Resin-based, It is Possible That Hard Coat Films Will be of Less Use.

Among the firms attached to the cover glass, the one placed on the back may be referred to as the anti-shatter film while the one on the front is referred to as the icon sheet. In this Report, all items attached to the cover glass of a capacitive touch panel is categorized as anti-shatter film. The market size was estimated based on the categorization of having icon sheets and anti-scatter films fall under the segment of hard coat films for top covers.

Hard Coat Films for Electrode (FY2010)



Contents

Chapter 1 Trends in the LCD Film Market

1. Polarizer Market

- 1-1-1. Annual Sales of Polarizer Manufacturers (Polarizer Business)
- 1-1-2. Production Capacity of Polarizer Manufacturers
- 1-1-3. Production Capacity and Shares of the World's Major Polarizer Manufacturers
- 1-1-4. Production Volume and Sales of Polarizers by LCD Type
- 1-1-5. Production Volume by Polarizer Manufacturer and LCD Mode in 2010
- 1-1-6. Production Volume by Polarizer Manufacturer and LCD Mode in 2011 (Estimate)
- 1-1-7. Production Volume by Polarizer Manufacturer and LCD Mode in 2012 (Forecast)
- 1-1-8. Market Analysis
- 1-1-9. Roll to Panel-Based Post-Processing at Panel Plants of Polarizer Manufacturers
- 1-1-10. Comparison of Production Rate of Polarizer Manufacturers
Enhance Production Efficiency by Improving Speed and Area Layout Efficiency
- 1-1-11. Wide Line Operations of Polarizer Manufacturers
LG Chem is Currently the Only Manufacturer With an Ultra-Wide 2,300 mm Line
- 1-1-12. Sales Shares of Polarizer Manufacturers at Korean Panel Manufacturers (in Value)
In Korea, Fierce Competition Continues among the Top Three:
NITTO DENKO, Dongwoo Fine-Chem and LG Chem
Cheil Industries Falls Somewhat Behind in Technology Despite Showing
Presence as a Supplier for Samsung Electronics
- 1-1-13. Sales Shares of Polarizer Manufacturers at Taiwanese Panel Manufacturers (in Value)
LG Chem Remains Strong in Taiwan Although Manufacturers
with Vertical Integration Hold High Shares
- 1-1-14. Sales Shares of Polarizer Manufacturers at Leading Chinese Panel Manufacturers (in Value)
In China's New Panel Market, Korean and Taiwanese
Manufacturers Compete While Japanese Manufacturers in
Considering Profitability May Calmly Wait & See
- 1-1-15. Sales Shares of Polarizer Manufacturers at Sharp
- 1-1-16. Sales Shares of Polarizer Manufacturers in
Panasonic Liquid Crystal Displays (former IPS Alpha)

2. Trends in the Chinese Polarizer Market

- 1-2-1. Annual Sales of Chinese Polarizer Manufacturers
- 1-2-2. Production Capacity of Chinese Polarizer Manufacturers
- 1-2-3. Positioning of SHENZHEN SAPO PHOTOELECTRIC
- 1-2-4. Sales Volumes and Shares of STN (LCD only) Polarizer Manufacturers in China
- 1-2-5. Sales Volumes and Shares of Manufacturers of Polarizers for 3D Glasses
- 1-2-6. Material Suppliers of Chinese Polarizer Manufacturers

3. Retardation Film Market

- 1-3-1. Annual Sales Volume of WV in the Large Products Segment
- 1-3-2. Annual Sales Volume of Retardation Films for Large-Size VA-LCDs by Manufacturer
- 1-3-3. Polarizer Manufacturers for Large-Size VA-LCDs and Retardation Films Used (2010 - 2011)
- 1-3-4. Polarizer Manufacturers for Large-Size VA-LCDs and Retardation Films Used (2011 - 2012)
FUJIFILM to Advance in the Large VA Segment in 2011 Amid Three-Cornered Competition
- 1-3-5. Annual Sales Volume of Retardation Films for Large-Size IPS-LCDs by Manufacturer
- 1-3-6. Polarizer Manufacturers for Large-Size IPS-LCDs and Retardation Films Used (2010 - 2011)
- 1-3-7. Polarizer Manufacturers for Large-Size IPS-LCDs and Retardation Films Used (2011 - 2012)
Acryl Film for IPS Increases Share Although FUJIFILM Projects a Return to Z-TAC
- 1-3-8. Annual Sales Volumes of Retardation Film
Manufacturers at Polarizer Manufacturers in Mid-to-Small Size STN-LCDs
- 1-3-9. Shares of Retardation Film Manufacturers at
Polarizer Manufacturers in Mid-to-Small Size STN-LCDs (10" or less)
- 1-3-10. Annual Sales Volume of Retardation Film for 3D Glasses
- 1-3-11. Annual Sales Volume of Retardation Films for AM OLED
- 1-3-12. Annual Sales Volume of Retardation Films for Mid-to-Small Size TN-TFTs by Manufacturer
- 1-3-13. Shares of Retardation Film Manufacturers at
Polarizer Manufacturers in Mid-to-Small Size TN-TFT LCDs
- 1-3-14. Materials for iPhone and iPod
- 1-3-15. Annual Sales Volume of Retardation Films in Small VA-LCDs by Manufacturer
- 1-3-16. Shares of Retardation Film Manufacturers at
Polarizer Manufacturers in Mid-to-Small Size VA-LCDs (10" or less)

- 1-3-17. Annual Sales Volume of Retardation Films for Mid-to-Small Size IPS-LCDs by Manufacturer
- 1-3-18. Shares of Retardation Film Manufacturers at
Polarizer Manufacturers in Mid-to-Small Size IPS-LCDs
- 1-3-19. Status of Material Manufacturers for iPhone 4
- 1-3-20. Status of Component Manufacturers for iPad

4. TAC Film Market

- 1-4-1. Overview of New TAC Film Manufacturers
- 1-4-2. Shares of TAC Film Suppliers at Leading Polarizer Manufacturers (2010 - 2011)

5. Polarizer Process Components Market

- 1-5-1. Sales Volumes of Polarizer-Use PET Protect Film by Manufacturers
- 1-5-2. Shares of PET Protect Film Manufacturers at LCD Polarizer Manufacturers
- 1-5-3. Production Sites of Leading PET Protect Film Manufacturers
- 1-5-4. Sales Volumes of Polarizer-Use Release Film Manufacturers
- 1-5-5. Shares of Release Film Manufacturers at Leading Polarizer Manufacturers

Chapter 2 Trends in the Hard Coat Film Market

2-1. Application For Electrode

Hard Coat Films for Resistive Touch Panels Increased Slightly While Demand for Films Sensors Grew with the Need for Lightweighting Capacitive Touch Panels
KIMOTO Leads With the Utmost High Share; TEIJIN and Oike Manufacture within Group
Varying Designs Applied for Capacitive Touch Panels Depending on the Manufacturer, Which Impacts Demand for Hard Coat Films
Need for Hard Coat Film That Makes the ITO Pattern Less Visible in Capacitive Touch Panels

2-2. Application For Top Cover

- Application for Icon Sheet
- Application for Top Cover – 1
- Application for Top Cover – 2

2-3. Use in Molding and Decoration

- IMD
- IML

Chapter 3 Comprehensive Analysis of the PET Film Market

- 3-1. Ratio of Optical Applications in Sales Volume of PET Films
- 3-2. Sales Volumes of Leading Manufacturers of PET Films for Optical Applications
- 3-3. Production Sites of Leading PET Film Manufacturers (Four Leading Japanese Manufacturers)
- 3-4. Production Sites of Leading PET Film Manufacturers (Five Leading Foreign Manufacturers)
- 3-5. Noteworthy PET Film Application: Use for Solar Cell Backsheet
Trends in Demand for PET Films for Solar Cell Backsheets
(All-Purpose + Hydrolysis Resistance + Coloring)
Trends in Demand for PET Films for Solar Cell Backsheets
(Other than All-Purpose Grade)
- 3-6. Noteworthy PET Film Application: White PET Film (for Reflective Sheet)
- 3-7. Noteworthy PET Film Application: Release Film
Share of Films for Silicone Coating by PET Film Manufacturer (2011 estimate)

Research analysis, report writing and editing by :

Hatsumi Yano
Tomoko Funaki
Kazuo Tamura