

Global In-Vehicle Touchscreen Market: Key Research Findings 2015

◆ **Research Outline**

Yano Research Institute has conducted a study on the global in-vehicle touchscreen market with the following conditions:

1. Research period: May to June, 2015
2. Research target: Manufacturers of touchscreens, displays, transparent conductive films, controller ICs, and adhesives
3. Research methodologies: Face-to-face interviews by the specialized researchers, surveys via telephone/email, and literature search

What are In-Vehicle Touchscreens?

In-vehicle touchscreens in this research indicate resistive, capacitive, and infrared touchscreens used for car navigation systems and other in-car devices. Such in-vehicle devices include those manufacturers' original products, products equipped at the car dealers, and those sold as aftermarket add-ons.

◆ **Key Findings**

■ **Global Shipment Volume of In-Vehicle Touchscreens in 2015 Projected to Attain 28.66 Million, 114.8% of Year Before**

Backed by market expansions of car navigation systems and display audios (DA), where touchscreens are mainly used for, and by wider range of use in rear-seat entertainment systems in addition to growing introduction of IT systems to automobiles, in-vehicle displays have increasingly adopted to improve the adoption rate of touchscreens into automobiles, which boosted the global in-vehicle touchscreen market to attain 24.95 million screens in 2014, based on the shipment volume at manufacturers, and is likely to achieve 28.66 million in 2015, 114.8% of that in 2014.

■ **Global Shipment Volume of In-Vehicle Capacitive Touchscreens in 2016 Likely to Attain Rapid Growth at 12.53 Million, 485.7% of Size of Previous Year**

There are three types of in-vehicle touchscreens, resistive, capacitive, and infrared. In 2014 23.75 millions of resistive touchscreens were shipped, dominating 95.2% of the global in-vehicle touchscreen market, followed by 1.2 million of capacitive touchscreens shipped, occupying 4.8%, and 3 thousands of infrared touchscreens shipped to account for 0.01%.

Although resistive touchscreens are the current mainstream of the in-vehicle touchscreens, increasing number of smartphones and tablets users has come to require in-vehicle touchscreens to have the same operability as smartphones and tablets. Also, in the course of pursuing improved designs in in-vehicle devices by the automakers and Tier1 auto parts manufacturers, the touchscreens have come to be thinner or made available for curved surface, achieved by capacitive touchscreens rather than resistive touchscreens. Therefore, the shipment volume of capacitive touchscreens is likely to rise rapidly to 12.53 million in 2016, 485.7% of that in 2015.

■ **Active Development by Display Manufactures Including In-Cell/On-Cell Types In Addition to Touchscreens + LCD Package**

The rising capacitive in-vehicle touchscreen market has driven not only the touchscreen manufacturers but also display makers to actively enter the market. As a plan to reinforce their in-vehicle display business, in-vehicle makers have focused on package sales of “Touchscreens + LCD” as well as in-cell and on-cell type that have built-in touch sensors for the models to be produced in the period between 2018 and 2019.

◆ **Report format:**

Published report: “In-Vehicle Touchscreen Market 2015”

Issued on: July 13, 2015

Language: Japanese

Format: 85 pages in A4 format

Price: 120,000 yen (Consumption tax shall be additionally charged for the sales in Japan.)

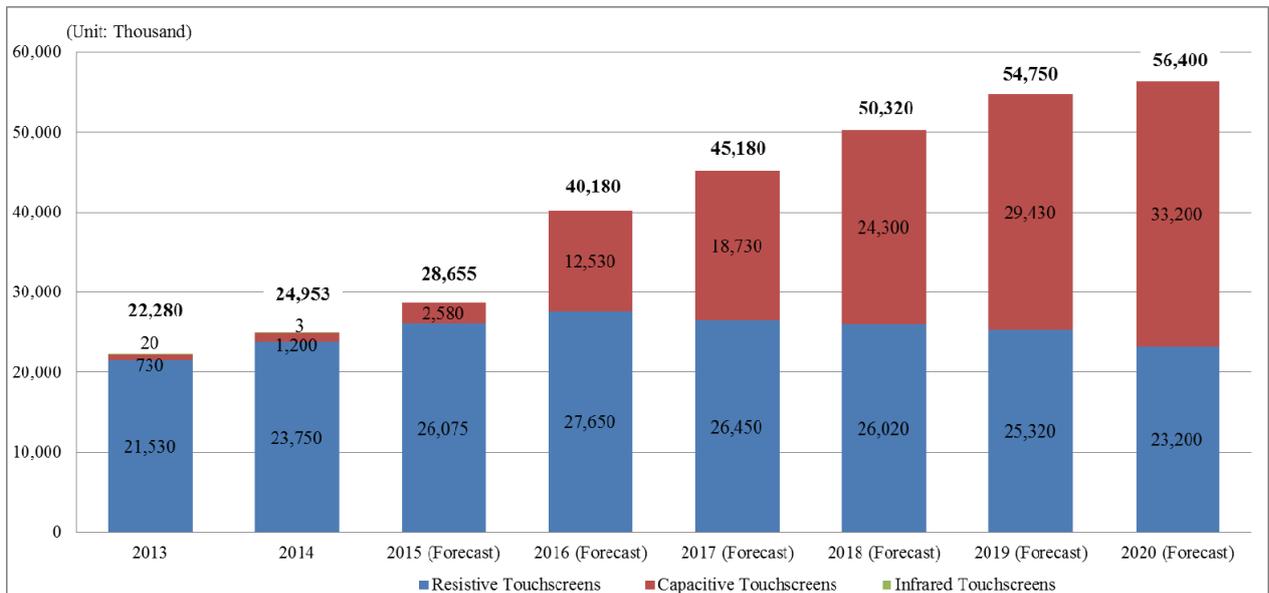
Contacts: Public Relations

Yano Research Institute Ltd. (URL: <http://www.yanoresearch.com>)

Phone: +81-3-5371-6912

E-mail: press@yano.co.jp

■ **Figure 1: Transition and Forecast of Global In-Vehicle Touchscreen Market by Category**

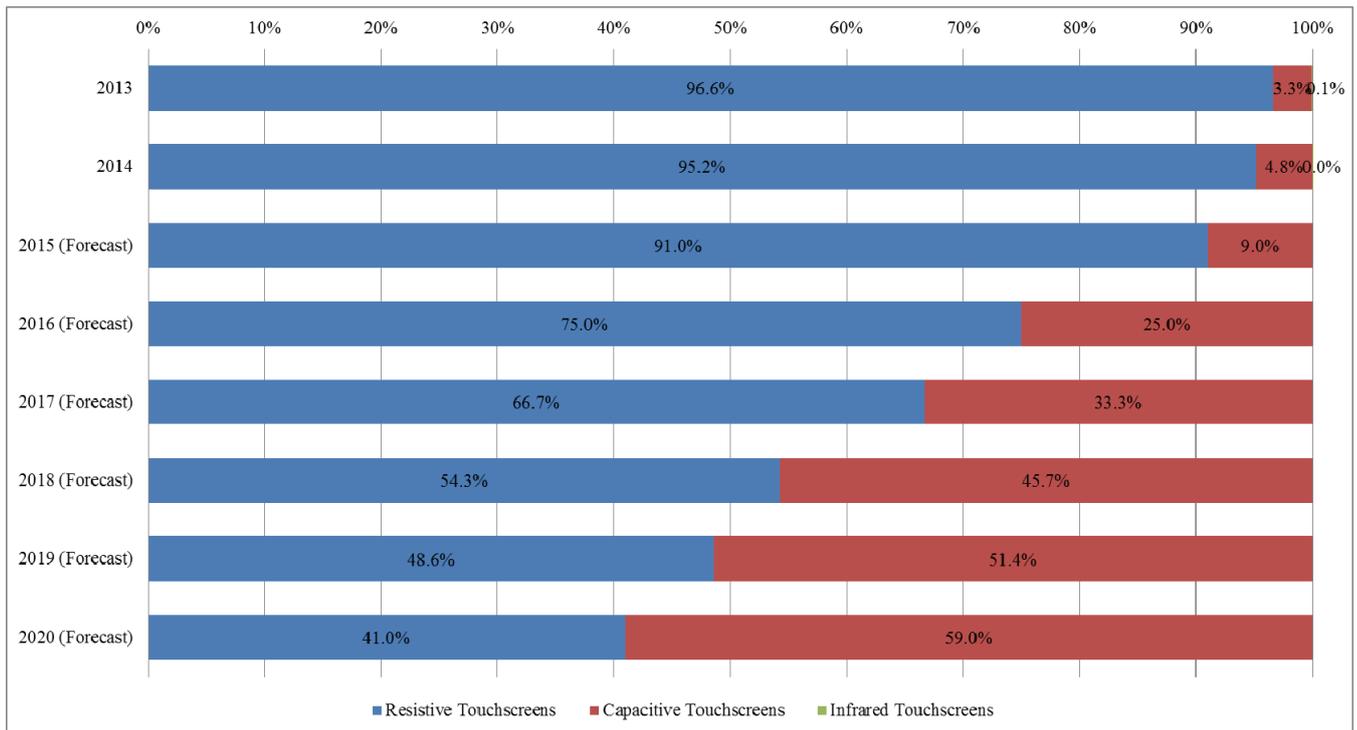


Notes:

Estimated by Yano Research Institute

1. The market size is based on the shipment volume of manufacturers of touchscreens.
2. The figures in 2015 and beyond are forecast values.

■ **Figure 2: Transition of Market Share of Global In-Vehicle Touchscreens by Type**



Estimated by Yano Research Institute

Notes:

- 3. The market size is based on the shipment volume of manufacturers of touchscreens.
- 4. The figures in 2015 and beyond are forecast values.