

Capacitive Touchscreen (Touch Panel)/Components Global Market: Key Research Findings 2017

◆ Research Outline

Yano Research Institute has conducted a study on the global capacitive touchscreen (touch panel) components market with the following conditions:

1. Research period: January to March, 2017
2. Research target: Manufacturers of touchscreens, transparent conductive films, cover glasses, OCA, and lead wire materials
3. Research methodologies: Face-to-face interviews by the specialized researchers, survey via telephone and email, and literature research

What are Capacitive Touchscreens?

Capacitive touchscreens or capacitive touch panels in this research indicate those screens on the surface of electronic devices to interact with whatever is displayed using one's finger. This research targets the following types: Out-cell type, in which touch sensor is laminated directly on top of LCD during manufacture; in-cell and on-cell types where touch sensor is embedded in LCD; and also those on-cell types including OCTA (On Cell Touch AMOLED) and Y-OCTA (Youn On Cell Touch AMOLED).

What are Capacitive Touchscreen Components?

Capacitive touchscreen (touch panel) components in this research indicate transparent conductive films, cover glasses, OCA (Optical Clear Adhesive), lead wire materials, and etc.

◆ Key Findings

■ **Global Shipment Volume of Capacitive Touchscreens for FY2017 Projected to Achieve 1,781.1 Million Pieces of Screens, 101.9 % on Y-o-Y Basis**

Being in tandem with the markets of smartphones and tablet terminals, the demand of global capacitive touchscreen market (based on the shipment volume at manufacturers) has slowed down in FY2016 to 103.0% of the size of the previous fiscal year to attain 1,747.6 million pieces of screens. Although the demand of smartphones is likely to continue growing for FY2017, slower growth rate may make the market size to end up being 1,781.1 million pieces, 101.9% of the size of the previous fiscal year.

■ **Smartphone Dominates 87.0% of Global Capacitive Touchscreen Market by Application at 1,520 Million Pieces of Screens in FY2016**

When looking at the global capacitive touchscreens by application in FY2016, the largest demand is held by smartphones that used 1,520 million pieces of screens, dominating 87.0% of the market, followed by tablet terminals that used 210 million pieces to occupy 12.0%, the third largest is note PCs using 16.0 million pieces to account for 0.9%, and the fourth is in-vehicle devices with 1.6 million to account for 0.1%.

■ **Demand of Film Sensors Expected to Expand for Smartphones Embedded with Flexible OLED Panel**

In the recent high-end smartphone market, the product development has become design-oriented, because of difficulty in differentiating the products from their performance or functions. This tendency has increased the adoption of flexible OLED panels to smartphones aiming to enable curved surface, replacing conventional LCD screens. In addition to Samsung having marketed smartphones that use dual edge screens to make curved surface on both sides of those flexible-OLED-panel-embedded smartphones, Apple also seems to be considering introducing flexible OLED panels for smartphones, too. Therefore, it is very likely that the demand of film sensors for flexible OLED displays to expand for the coming future.

◆ **Report Format:**

Published report: “Capacitive Touchscreens and Components Market 2017”

Issued on: March 31, 2017

Language: Japanese

Format: 219 pages in A4 format

Price: 160,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

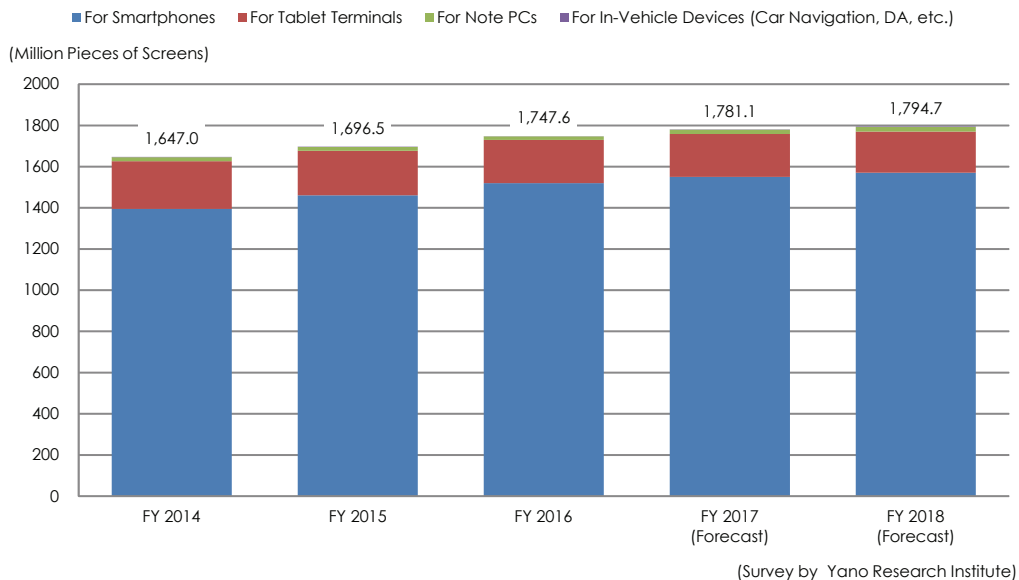
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■ **Figure 1: Transition and Forecast of Global Capacitive Touchscreen Market Size by Application/Structure**



Notes:

1. The market size is based on the shipment volume at manufacturers.
2. The values of 2017 and beyond are forecast values.
3. The on-cell type screens including OCTA (On Cell Touch AMOLED) and Y-OCTA (Youn On Cell Touch AMOLED).

■ **Table 1: Transition and Forecast of Global Capacitive Touchscreen Market Size by Application/Structure**

(Unit: Million Pieces of Screens)

	FY 2014		FY 2015		FY 2016		FY 2017 (Forecast)		FY 2018 (Forecast)	
		Y-o-Y		Y-o-Y		Y-o-Y		Y-o-Y		Y-o-Y
For Smartphones	1,395	118.9%	1,460	104.7%	1,520	104.1%	1,550	102.0%	1,570	101.3%
Glass Sensors	310	79.5%	150	48.4%	75	50.0%	30	40.0%	10	33.3%
Film Sensors	670	148.9%	750	111.9%	780	104.0%	880	112.8%	900	102.3%
In-cell	210	137.3%	320	152.4%	310	96.9%	245	79.0%	130	53.1%
On-cell	205	113.9%	240	117.1%	355	147.9%	395	111.3%	530	134.2%
For Tablet Terminals	231	88.8%	217	93.9%	210	96.8%	208	99.0%	200	96.2%
Glass Sensors	80	88.9%	75	93.8%	70	93.3%	50	71.4%	25	50.0%
Film Sensors	150	88.2%	140	93.3%	135	96.4%	150	111.1%	160	106.7%
In-cell	-	-	-	-	1	-	2	200.0%	5	250.0%
On-cell	1	-	2	200.0%	4	200.0%	6	150.0%	10	166.7%
For Note PCs	20.5	107.9%	18.5	90.2%	16.0	86.5%	21.0	131.3%	22.0	104.8%
Glass Sensors	19	105.6%	17	89.5%	15	88.2%	15	100.0%	10	66.7%
Film Sensors	1.5	150.0%	1.5	100.0%	1	66.7%	5	500.0%	10	200.0%
In-cell/On-cell	-	-	-	-	-	-	1	-	2	200.0%
For In-Vehicle Devices (Car Navigation, DA, etc.)	0.5	166.7%	1.0	200.0%	1.6	160.0%	2.1	131.3%	2.7	128.6%
Glass Sensors	0.5	166.7%	0.9	180.0%	1.4	155.6%	1.7	121.4%	1.8	105.9%
Film Sensors	-	-	0.1	-	0.2	200.0%	0.4	200.0%	0.7	175.0%
In-cell/On-cell	-	-	-	-	-	-	-	-	0.2	-
Total	1,647.0	113.4%	1,696.5	103.0%	1,747.6	103.0%	1,781.1	101.9%	1,794.7	100.8%

(Survey by Yano Research Institute)

Notes:

4. The market size is based on the shipment volume at manufacturers.
5. The values of 2017 and beyond are forecast values.
6. The on-cell type screens including OCTA (On Cell Touch AMOLED) and Y-OCTA (Youn On Cell Touch AMOLED).