

Global In-Vehicle Touchscreen Market: Key Research Findings 2017

◆ **Research Outline**

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

1. Research period: April to June, 2017
2. Research target: Manufacturers of in-vehicle resistance-film touchscreens, in-vehicle capacitive touchscreens, transparent conductive films, cover plastics, cover glasses, controller ICs, and OCA
3. Research methodologies: Face-to-face interviews by the expert researchers, surveys via telephone/email, and literature search

What are In-Vehicle Touchscreens?

The in-vehicle touchscreens in this research indicate those used for car navigation systems and other in-car devices, which include resistance-film touchscreens, out-cell capacitive touchscreen modules, and in-cell/on-cell capacitive touchscreens embedded with touch sensor functions. Note that infrared touchscreens were introduced until 2014, but not have been increased installation ever since.

Those in-vehicle devices embedded with touchscreens include genuine products from manufacturers, optional equipment offered by dealership, and products sold at aftermarket.

◆ **Key Findings**

■ **Global Shipment Volume of In-Vehicle Touchscreens in 2017 Projected to Attain 47,040 Thousand, 106.1% of Year Before**

In-vehicle touchscreens have expanded being installed for use as UI to control not only conventional car navigation systems, but also some in-car systems that have been increasingly introduced in vehicles such as DA (display audios) connected with smartphones for email communications and browsing of information, and RSE (Rear Seat Entertainment) installed at rear seats for the passengers to use internet or to enjoy watching movies and etc. Against this backdrop, the global in-vehicle touchscreen market, based on the shipment volume at manufacturers, is projected to attain 47,040 thousand in 2017, 106.1% of that of the year before.

■ **Global Shipment Volume of In-Vehicle Capacitive Touchscreens in 2017 Expected to Attain 24,340 Thousand, 134.0% of Previous Year**

In-vehicle touchscreens for in-car devices have the following types: Resistance-film, capacitive, and infrared touchscreens, among which the resistance-film and capacitive touchscreens are currently the mainstream. However, due to the recent accelerated shift in the demand of in-vehicle touchscreens from resistance-film types to capacitive types especially in the genuine product market including car navigation systems, the market size of in-vehicle capacitive touchscreens in 2017, based on the shipment volume at manufacturers, is projected to attain 24,340 thousand screens, 134.0% of the size of the previous year. In addition to its superiority of intuitive display devices equipped with multi-touch-sensing and highly-sensitive touch

functions, capacitive touchscreens allow flexibility in designs enabling to make their surfaces curved, their shapes vary, and their sizes larger. Because of such characteristics especially as curved surfaces and varied shapes praised by automakers and Tier-1 auto parts manufacturers, capacitive touchscreens are projected to expand the adoption in automobiles.

■ **Accelerated Demand Shift to Capacitive Touchscreens Leads to Occupy 72.6% of Entire Global Market by 2020**

In-vehicle touchscreens is likely to keep on elevating expectations of automakers and Tier-1 auto parts manufacturers for higher operability, larger display sizes, and etc. In-vehicle capacitive touchscreens are the UI that can respond to such diverse user needs. Therefore, 72.6% of the entire global in-vehicle touchscreen market is likely to be capacitive touchscreens by 2020.

◆ **Report Format:**

Published report: “In-vehicle Touchscreen/Component Market 2017”

Issued on: June 30, 2017

Language: Japanese

Format: 163 pages in A4 format

Price: 150,000 yen (Consumption tax shall be additionally charged for the sales in Japan.)

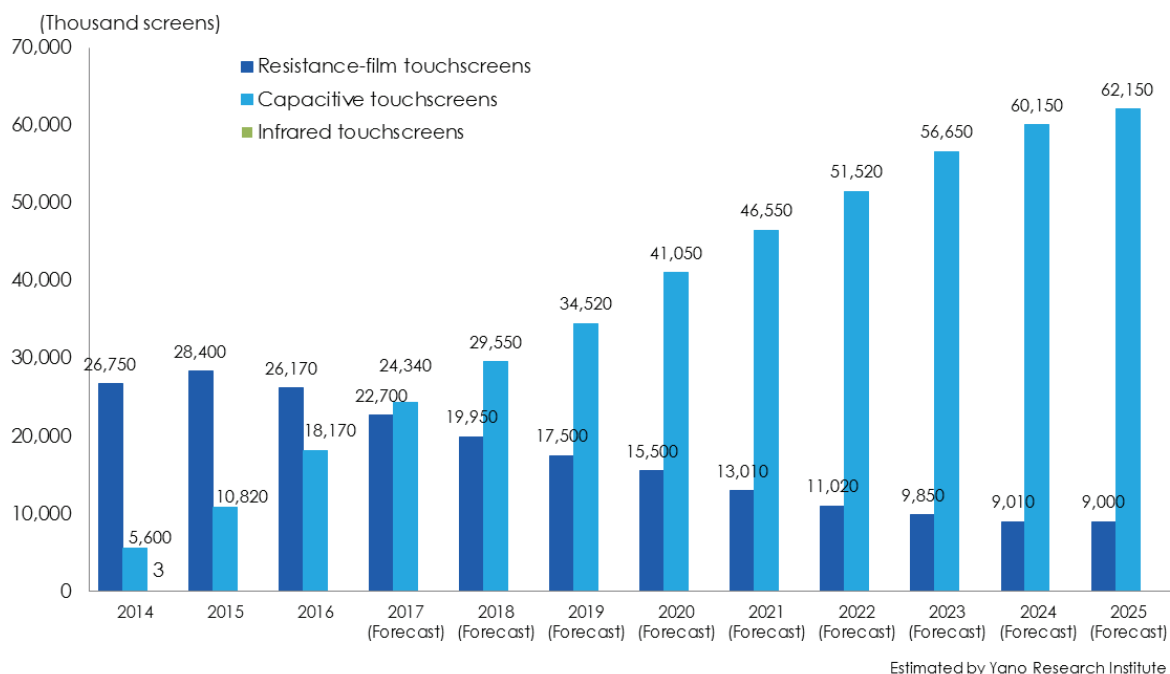
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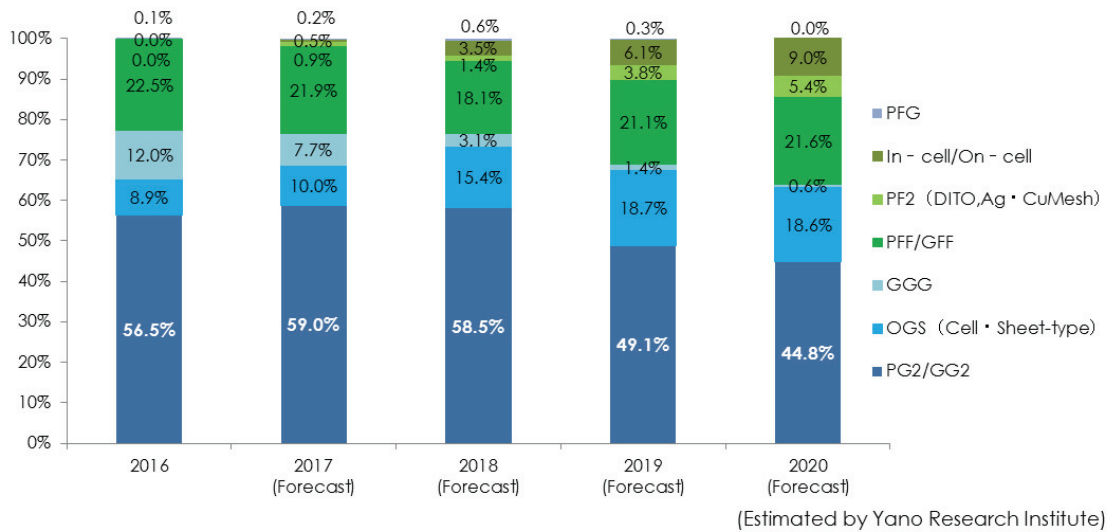
■ **Figure 1: Transition and Forecast of Global In-Vehicle Touchscreen Market by Type**



Notes:

1. The market size is based on the shipment volume at manufacturers.
2. Those in-vehicle devices embedded with touchscreens include genuine products from manufacturers, optional equipment offered by dealership, and commercial products.
3. The figures in 2017 and beyond are forecast volume.

■ **Figure 2: Forecast of Composition Ratio of Global In-Vehicle Capacitive Touchscreens by Structure**



Notes:

- The market size is based on the shipment volume at manufacturers.
- Those in-vehicle devices embedded with capacitive touchscreens include genuine products from manufacturers, optional equipment offered by dealership, and commercial products.
- The figures in 2017 and beyond are forecast volume.
- Total and/or rate of the above figures may not match, as a result of round off.

■ **Figure 3: Trends of Technologies for In-Vehicle Capacitive Touchscreens by Component**

