

Global AMOLED Market: Key Research Findings 2017

◆ **Research Outline**

Yano Research Institute has conducted a study on the global markets of AMOLED displays and their major components with the following conditions:

1. Research period: July to October, 2017
2. Research targets: Manufacturers of AMOLED screens used for displays, of element materials (luminescent materials, common materials), encapsulants, capacitive touchscreens, polarizing plates, substrates, and etc.
3. Research methodologies: Face-to-face interviews, surveys via telephone/email, and literature research

What are AMOLED Displays?

AMOLED (Active-Matrix Organic Light Emitting Diode) in this research indicates organic light emitting diode that use active matrix addressing scheme. AMOLED displays are used for smartphones, tablet PCs, TVs, and small home electric appliances including portable audios.

◆ **Key Findings**

■ **Global AMOLED Display Market in 2016 Expanded to Record 135.9% on Y-o-Y Basis to Achieve 422.0 Million Displays, Exceeding 400 Million in Volume**

In 2016, the global AMOLED display market has grown to 135.9% of the market size of the previous year to attain 422 million displays, exceeding 400 million in volume, because of the following reasons: The global AMOLED displays, that had used to be only introduced in high-end smartphones, have widened the adopted areas and have started being introduced in middle-end products; and Samsung Display Co.,Ltd, the once sole company to mass-manufacture small-to-middle sized AMOLED displays, has started selling AMOLED displays to Chinese smartphone makers such as OPPO Electronic, Vivo, and etc.

■ **Global AMOLED Display Market Projected to Attain 134.1% on Y-o-Y Basis by 2018 to Reach 635.5 Million Displays**

The global AMOLED display market for smartphones in 2017 is projected to expand further, due to adoption not only in “Galaxy series” but also in “iPhone X,” newly released by Apple in November 2017. In addition to quantitative expansion by being adopted in Apple products, AMOLED displays is likely to expand adoption also in the products by Chinese manufacturers that try to use the same parts and devices as Apple. Because not only Samsung but also LG Display Co., Ltd. resumed mass production of AMOLED displays for smartphones, and because the demand of AMOLED displays has expanded to diverse application not limited to smartphones, i.e., smartwatches, 2in1-PC, and etc., the global AMOLED display market is likely to rapidly expand again to 635.5 million displays by 2018, 134.1% of the size of the previous year.

■ **Global AMOLED Display Market Size Expected to Expand to 1,536.6 Million in Volume by 2022, Three Times Larger than That of 2016**

With the demand of AMOLED displays being expected to increase, some display makers including BOE Technology Group Co., Ltd., Japan Display Inc., Sharp Corporation, China Star Optoelectronics Technology Co., Ltd., and Tiama Micro-electronics Co., Ltd. and etc., have proactively carried out capital investment in order to start producing AMOLED displays. The full production of AMOLED displays by such newly entered display makers is considered to be started from 2019 to 2022.

Against a backdrop of expanding adoption of small-to-middle size AMOLED displays in smartphones and other devices, increasing demands of large AMOLED displays associated with launch of the OLED-TV market, and some changes of market environment stemming from newly-entered display makers, the global market of AMOLED displays is likely to expand to 1,536.6 million displays by 2022, three times larger than the size of 2016.

◆ **Report Format:**

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Price: 180,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

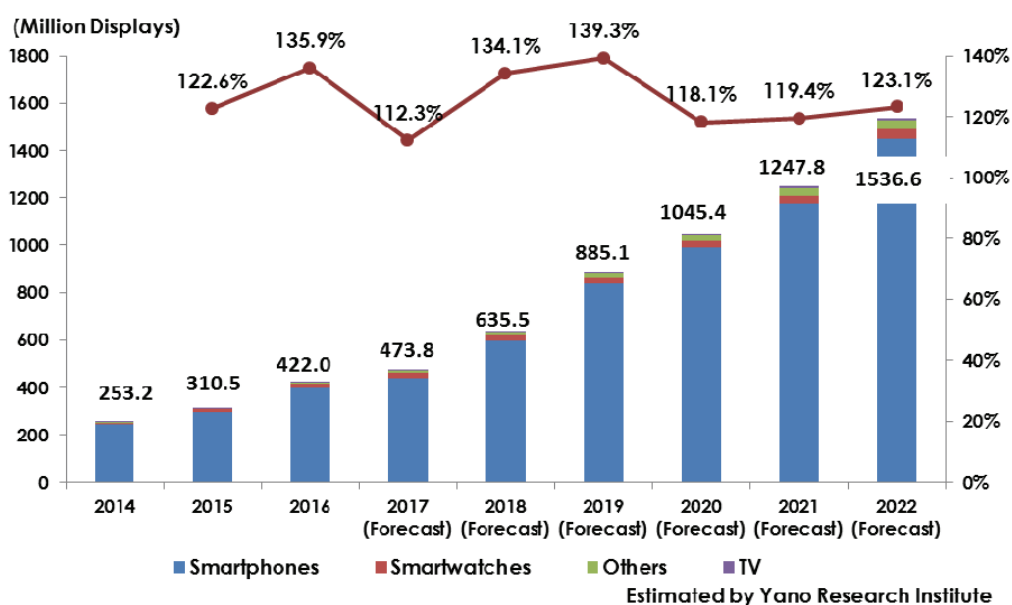
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■ **Figure1: Transition and Forecast of Global AMOLED Display Market Size**



Notes:

1. The market size is based on the shipment volume at manufacturers.
2. The market does not include PMOLED (Passive Matrix OLED).
3. Others include Tablet PCs, HMD (Head Mount Displays), In-vehicle displays, and etc.