

LED Markets in South Korea, Taiwan and China: Key Research Findings 2010

➡ Research Outline

Yano Research Institute has conducted a study on the LED markets in South Korea, Taiwan and China with following conditions.

1. Research period: August to November 2010
2. Research targets: Manufacturers engaged in LED businesses (chips, packages, LED lighting, etc.) in South Korea, Taiwan and China
3. Research methodologies: Face-to-face interviews and literature research

<What is the LED markets in South Korea, Taiwan and China?>

In this study (LED markets in South Korea, Taiwan and China), the markets for LED chips and LED packages in respective countries are covered. The total LED market size is estimated based on sales revenue of the major manufacturers' LED businesses partially including LED modules. The foreign exchange rates applied in this study are; 1 Korean won = approx. 0.07 yen, NT\$1.00 = approx. 2.8 yen and RMB1.00 = approx. 12.56 yen.

➡ Key Findings

- ◆ **Total LED market size in South Korea is expected to reach 4.95 trillion won (approx. 261% of the previous year) in 2010.**

Total LED market size in South Korea was 1.8943 trillion won (approx. 132.6 billion yen) in 2009. The market size in 2010 is expected to grow to 4.95 trillion won, or approx. 261% of the year before, due mainly to increase of use of LEDs for LCD TVs.

- ◆ **Total LED market size in Taiwan is expected at NT\$121 billion (approx. 160% of the previous year) in 2010.**

Total LED market size in Taiwan was NT\$75.6 billion (approx. 211.6 billion yen) in 2009. Taiwanese LED market follows the same trends as the Korean market and demand for LEDs for LCD backlight has been increasing. Furthermore, exports of LED chips to South Korea have been increasing as the quality of Taiwanese LED chips improves. As a consequence, the LED market size in Taiwan in 2010 is expected to expand to approx. 160% of the previous year, or NT\$121 billion (approx. 338.8 billion yen).

- ◆ **Total LED market size in China is expected at RMB26.6 billion (approx. 117% of the previous year) in 2010.**

Total LED market size in China was RMB22.7 billion (approx. 285.1 billion yen) in 2009. In 2010, the market size is estimated to be RMB26.6 billion (approx. 334 billion yen), approx. 117% of the year before. The market has been continuously growing owing to huge demands from the domestic market stemmed from installation of outdoor displays, landscape lightings, etc. against the backdrop of the construction boom, while there are technological gaps between preceding manufacturers and follower manufacturers.

✦ **Report format:**

Published report: "White LED Market 2010: China, Korea and Taiwan"

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Language: Japanese

Format: 162 pages in A4 format

Price: 180,000 yen (9,000 yen of consumption tax will be additionally charged for sales in Japan.)

Contacts:

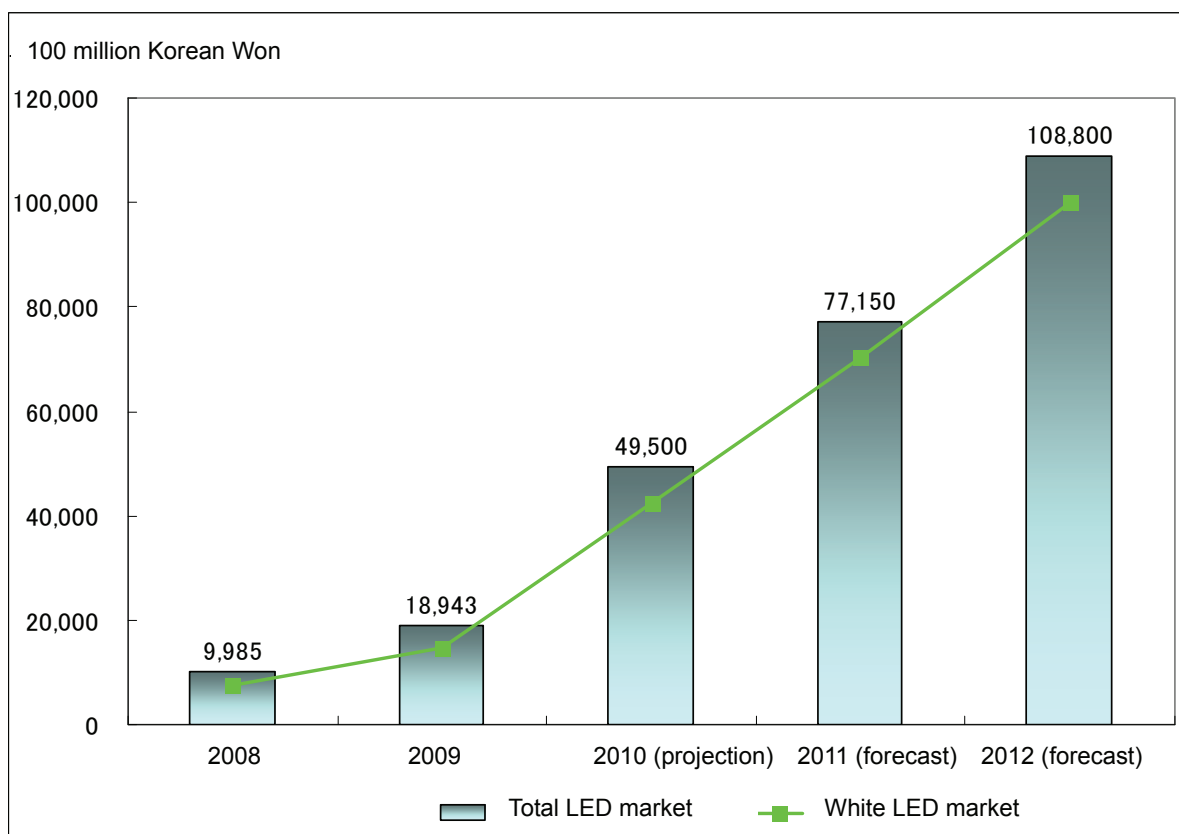
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Figure 1: LED Market Size in South Korea (Historical transition and forecast)

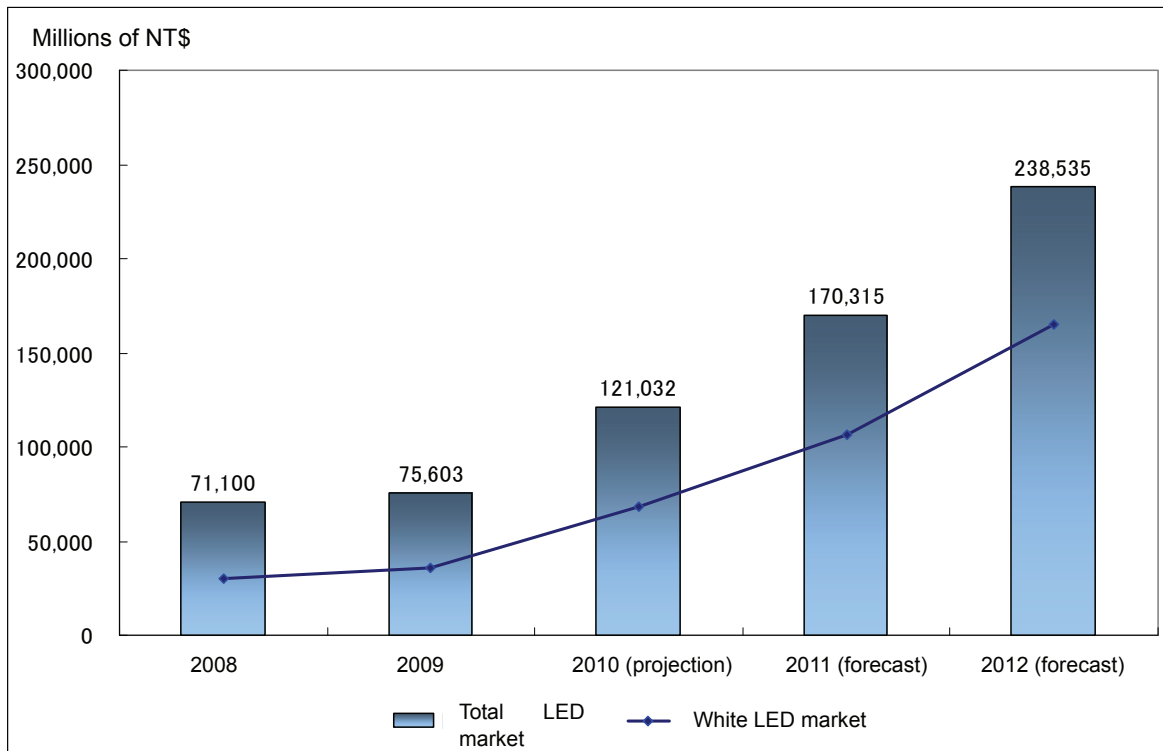


Estimated by Yano Research Institute

Note:

- 1) The market size is based on manufacturers' sales revenue on LED businesses.
- 2) LED modules are partially included.

Figure 2: LED Market Size in Taiwan (Historical transition and forecast)



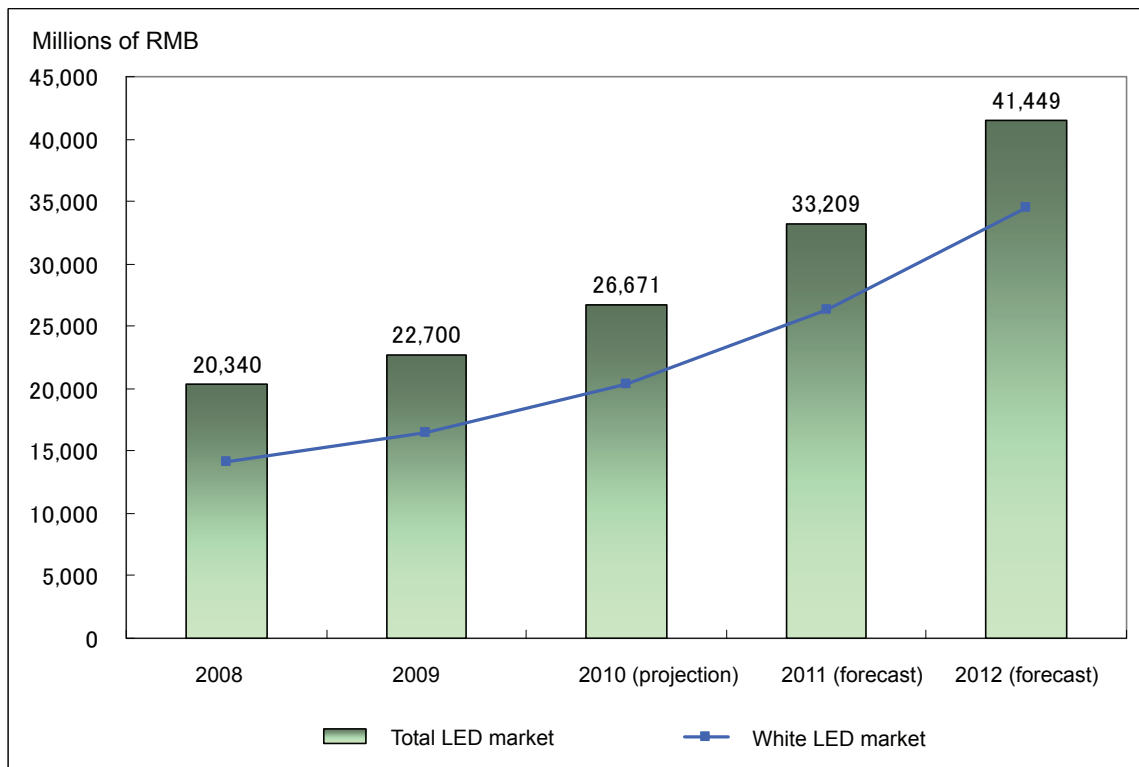
Note:

Estimated by Yano Research Institute

3) The market size is based on manufacturers' sales revenue on LED businesses.

4) LED modules are partially included.

Figure 3: LED Market Size in China (Historical transition and forecast)



Note:

5) Estimated by Yano Research Institute based on the data from China Solid State Lighting Alliance (CSA).

6) The market size is based on manufacturers' sales revenue on LED businesses.