2Q21_Quarterly AMOLED Materials and Components Market tracker

2Q, 2021

Analyst
Daejeong YOON

ydj7211@ubiresearch.com
Website : www.ubiresearch.com

Table of Contents

1. Reference Guide
2. Sales Performance
3. Supply Volume
4. Sales Forecast
5. Usage Forecast

Reference Guide

Application Covered
- Smartphone
- TV

Actual and Forecast
- Quarterly update
- History : 3-year, Forecast : 5-year

Nation Covered
- Korea
- China

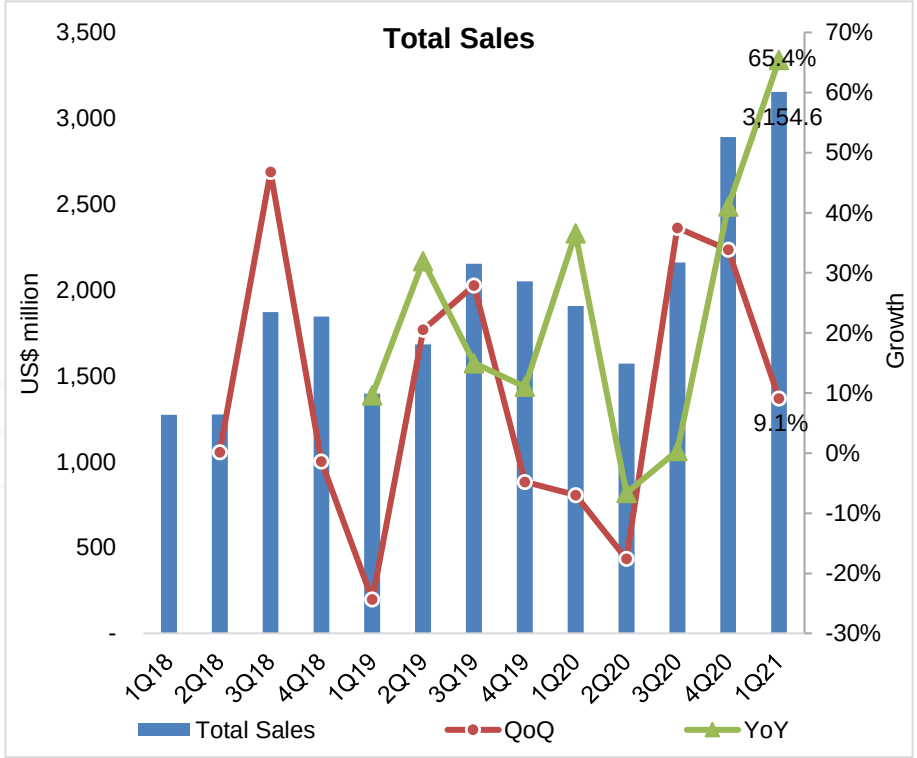
Unit
- Revenue : US$ millions
- Volume : kg, ea, m^2

Purpose Covered
- Cover window: 2D, 3D, CPI, UTG
- Touch: Add-on, On-cell
- Polarizer
- OCA, OCR
- Encapsulation: Glass, Frit glass, TFE, Metal foil
- Substrate: Glass, Carrier glass, Polyimide
- PSPI
- Process Film
- Complex sheet
- Driver IC

© 2021. UBI Research. All rights reserved.

Sales Performance

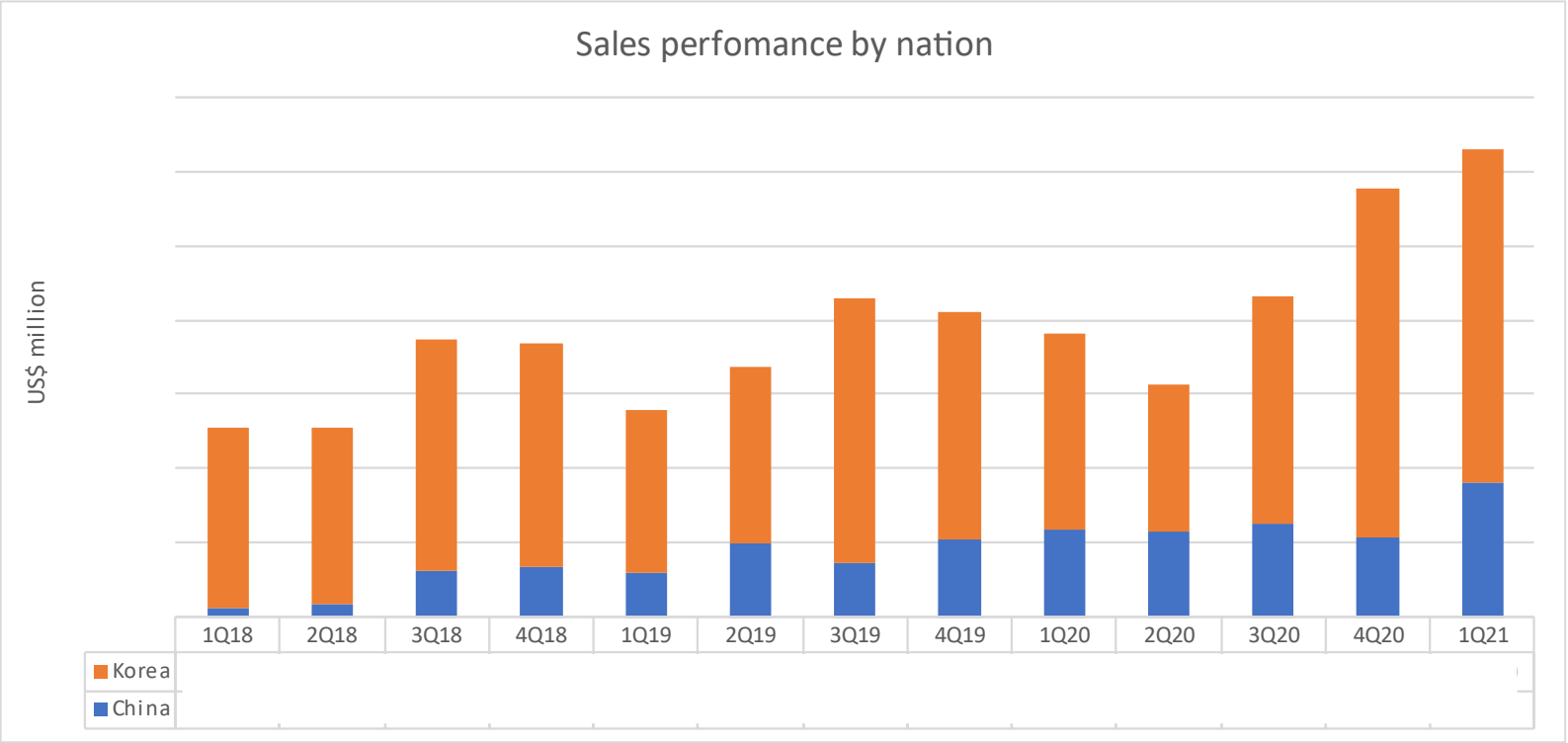
- 2021년 1분기 부품소재 구매액은 31.5억 달러로 집계되었음.
- 2021년 1분기 부품소재 시장은 전 분기 대비 9.1% 상승하였으며, 전년 동 분기 대비 65.4% 상승한 수치임.
- 부품소재 시장의 상승 요인은 driver-IC 공급 부족에 따른 재료 단가 상승의 영향이 큼. QHD급 기준으로 2020년 1분기 단가는 대략 5불이었으나, 현재는 8~10불에 거래되고 있음.
- 삼성 디스플레이의 부품소재 구매액은 16.7억 달러로, 전체 시장의 52.8%를 차지하고 있음.
- LG 디스플레이의 부품소재 구매액은 5.9억 달러로 전체 시장 중 18.6%의 비율을, BOE는 4억 달러로 전체 중 12.8%의 비율을 차지하였음.
- OCA는 2021년 1분기에 4,400만 달러의 시장을, 공정용 필름은 4,600만 달러의 시장을 형성하였음.



Source : Quarterly AMOLED Materials and Components Market Tracker, 2Q21

© 2021. UBI Research. All rights reserved.

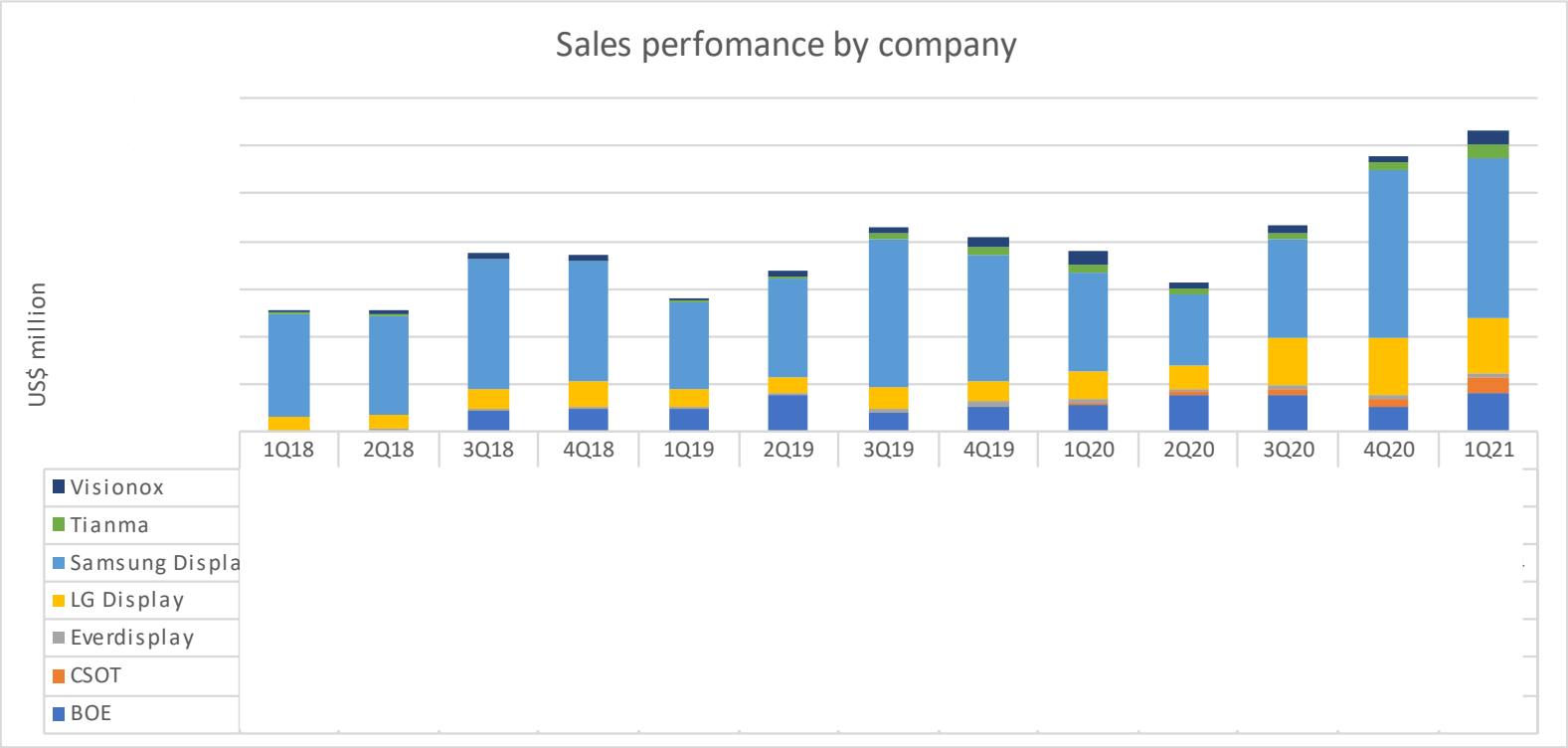
Sales Performance by Nation



Source : Quarterly AMOLED Materials and Components Market Tracker, 2Q21

© 2021. UBI Research. All rights reserved.

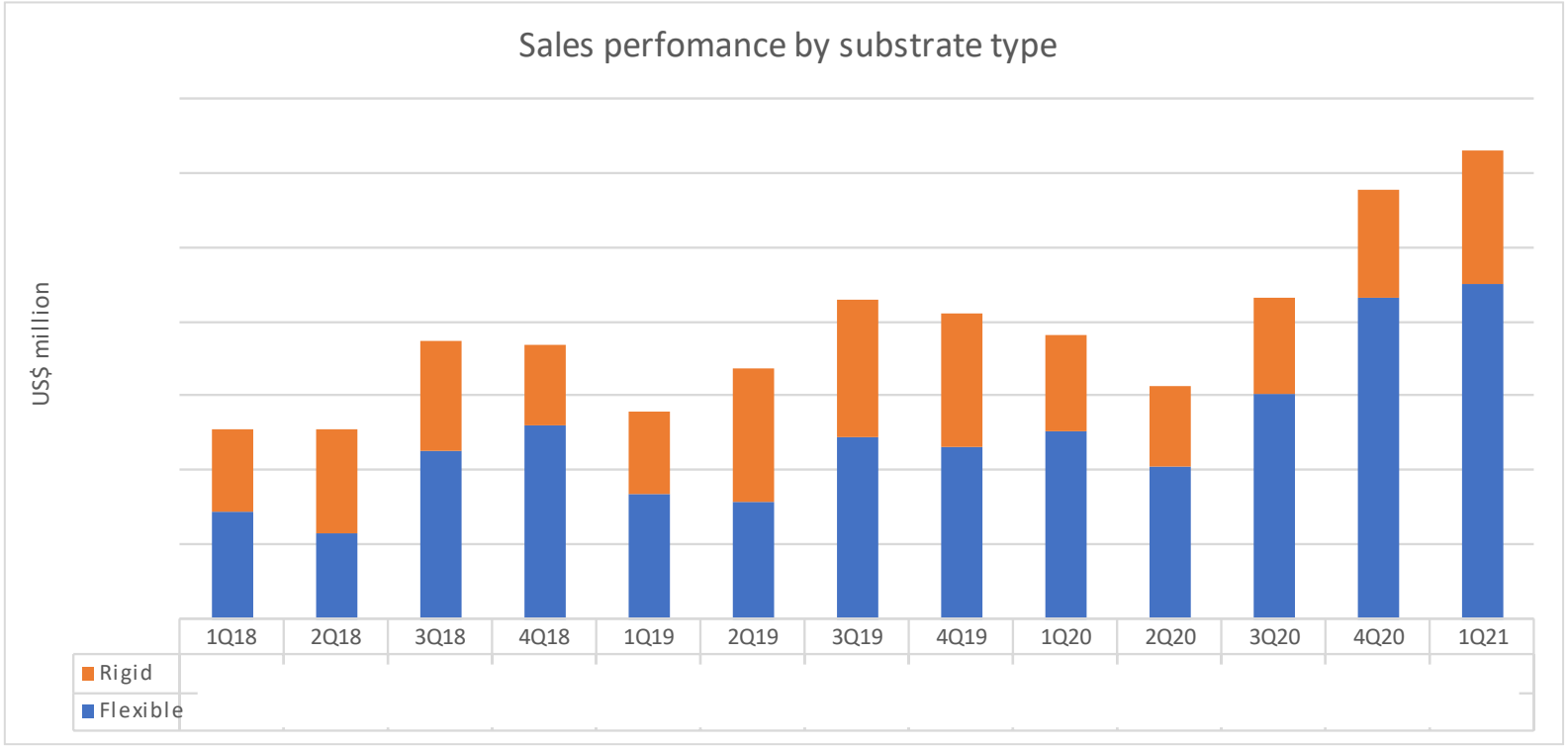
Sales Performance by Company



Source : Quarterly AMOLED Materials and Components Market Tracker, 2Q21

© 2021. UBI Research. All rights reserved.

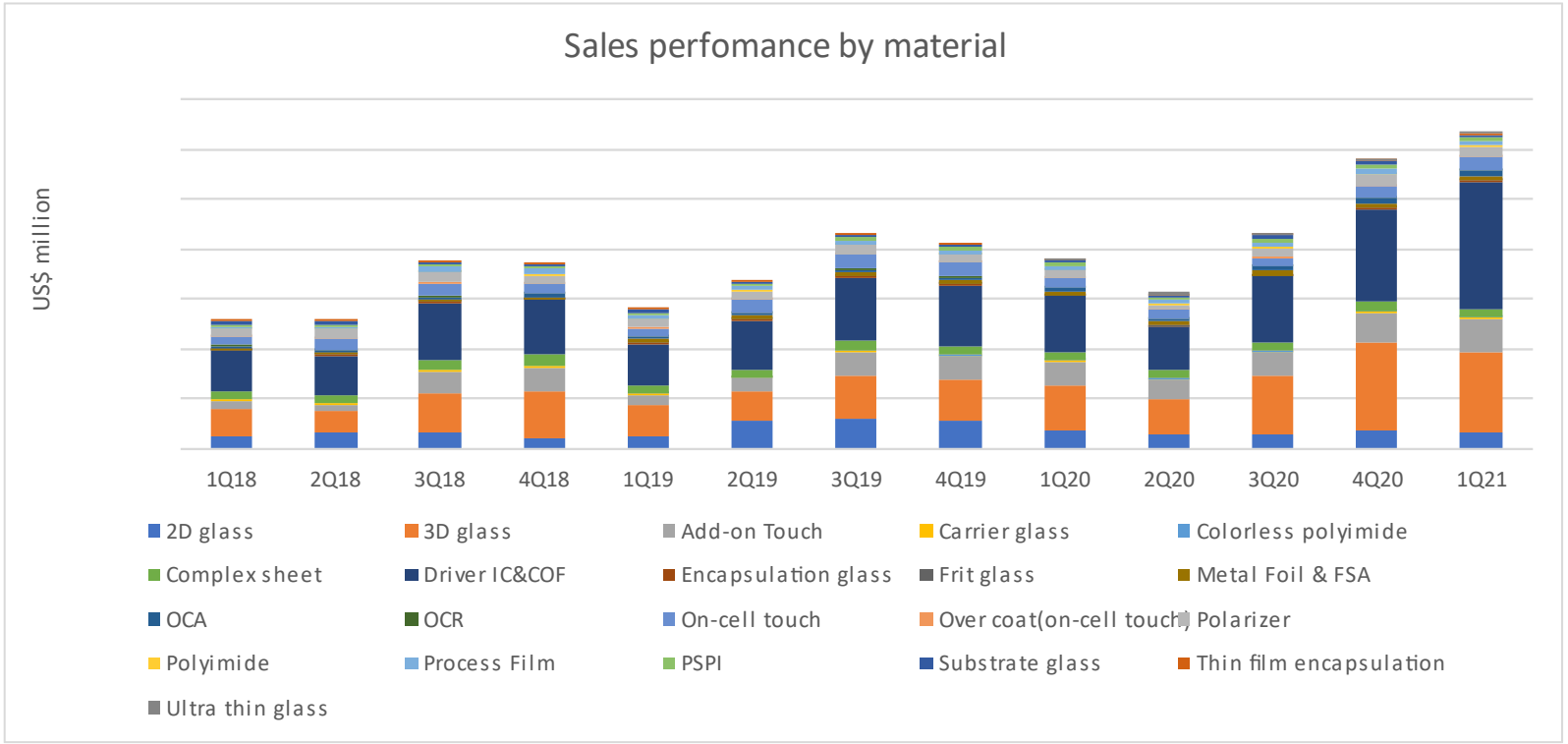
Sales Performance by Substrate Type



Source : Quarterly AMOLED Materials and Components Market Tracker, 2Q21

© 2021. UBI Research. All rights reserved.

Sales Performance by Material



Source : Quarterly AMOLED Materials and Components Market Tracker, 2Q21

© 2021. UBI Research. All rights reserved.

Supply Volume

M&C	Unit	1Q18	2Q18	3Q18	4Q18	1Q19	2Q19	3Q19	4Q19	1Q20	2Q20	3Q20	4Q20	1Q21
2D glass	million ea													
3D glass	million ea													
Add-on Touch	million ea													
Carrier glass	1,000,000 m^2													
Colorless polyimide	million ea													
Complex sheet	1,000,000 m^2													
Driver IC&COF	million ea													
Encapsulation glass	1,000,000 m^2													
Frit glass	Ton													
Metal Foil & FSA	1,000,000 m^2													
OCA	million ea													
OCR	Ton													
On-cell touch	1,000,000 m^2													
Over coat(on-cell touch)	Ton													
Polarizer	million ea													
Polyimide	Ton													
Process Film	1,000,000 m^2													
PSPI	Ton													
Substrate glass	1,000,000 m^2													
Thin film encapsulation	ton													
Ultra thin glass	million ea													

Source : Quarterly AMOLED Materials and Components Market Tracker, 2Q21

© 2021. UBI Research. All rights reserved.

Sales Forecast by Material_Large Sized OLED

Source : Quarterly AMOLED Materials and Components Market Tracker, 2Q21

© 2021. UBI Research. All rights reserved.

Analyst
Daejeong YOON