

# 3Q21\_Quarterly AMOLED Materials and Components Market tracker

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## AMOLED Components & Material Market Track

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## ■ Average Sales Price of Components & Materials

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> Average Sales Price of Components & Materials

\* Market of Key 20 components for OLED

\* No process cost on colorless polyimide's cost based on 8 inch

\* Cost of ultra thin glass includes process cost based on 7.6 inch

### > Average Sales Price of Components & Materials

Components & Material		Unit	1Q18	2Q18	3Q18	4Q18	1Q19	2Q19	3Q19	4Q19	1Q20	2Q20	3Q20	4Q20	1Q21	2Q21
Substrate	Substrate glass	\$/m <sup>2</sup>														
	Carrier glass	\$/m <sup>2</sup>														
	Polyimide	\$/kg														
TFT	PSPi	\$/kg														
Encapsulation	Frit glass	\$/kg														
	Encapsulation glass	\$/m <sup>2</sup>														
	Thin film encapsulation	\$/kg														
	Metal Foil & FSA	\$/m <sup>2</sup>														
Touch sensor	On-cell touch	\$/m <sup>2</sup>														
	Add-on Touch	\$/ea														
	Over coat(on-cell touch)	\$/kg														
Polarizer	Polarizer	\$/ea														
Adhesive	OCR	\$/kg														
	OCA	\$/ea														
Cover window	2D & 3D glass	\$/ea														
	Colorless Polyimide	\$/ea														
	Ultra thin glass	\$/ea														
Module	Driver IC & COF	\$/ea														
	Complex sheet	\$/m <sup>2</sup>														
	Process Film	\$/m <sup>2</sup>														

## ■ Components & Material Market Sales Performance\_Quarterly

Nation	(모두)	▼
Company	(모두)	▼
Application	(모두)	▼
Substrate type	(모두)	▼

	US\$ million													
M&C	Sum of Ex_1Q18	Sum of Ex_2Q18	Sum of Ex_3Q18	Sum of Ex_4Q18	Sum of Ex_1Q19	Sum of Ex_2Q19	Sum of Ex_3Q19	Sum of Ex_4Q19	Sum of Ex_1Q20	Sum of Ex_2Q20	Sum of Ex_3Q20	Sum of Ex_4Q20	Sum of Ex_1Q21	Sum of Ex_2Q21
2D glass														
3D glass														
Add-on Touch														
Carrier glass														
Colorless polyimide														
Complex sheet														
Driver IC&COF														
Encapsulation glass														
Frit glass														
Metal Foil & FSA														
OCA														
OCR														
On-cell touch														
Over coat(on-cell touch)														
Polarizer														
Polyimide														
Process Film														
PSPi														
Substrate glass														
Thin film encapsulation														
Ultra thin glass														
<b>총합계</b>														

## ■ Components & Material Supply Volume\_Quarterly

Nation	(All)	▼
Company	(All)	▼
Application	(All)	▼
Substrate type	(All)	▼

M&C	Unit	Value														
		1Q18	2Q18	3Q18	4Q18	1Q19	2Q19	3Q19	4Q19	1Q20	2Q20	3Q20	4Q20	1Q21	2Q21	
2D glass	million ea															
3D glass	million ea															
Add-on Touch	million ea															
Carrier glass	1,000,000 m2															
Colorless polyimide	million ea															
Complex sheet	1,000,000 m2															
Driver IC&COF	million ea															
Encapsulation glass	1,000,000 m2															
Frit glass	ton															
Metal Foil & FSA	1,000,000 m2															
OCA	million ea															
OCR	ton															
On-cell touch	1,000,000 m2															
Over coat(on-cell touch)	ton															
Polarizer	million ea															
Polyimide	ton															
Process Film	1,000,000 m2															
PSPI	ton															
Substrate glass	1,000,000 m2															
Thin film encapsulation	ton															
Ultra thin glass	million ea															

### ■ Components & Materials Market Sales Forecast

Nation	(All)	▼
Company	(All)	▼
Application	(All)	▼
Substrate type	(All)	▼

(US\$ million)

	US\$ million				
M&C	▼ Sum of Ex_2021	Sum of Ex_2022	Sum of Ex_2023	Sum of Ex_2024	Sum of Ex_2025
2D glass					
3D glass					
Add-on Touch					
Carrier glass					
Colorless polyimide					
Complex sheet					
Driver IC&COF					
Encapsulation glass					
Frit glass					
Metal Foil & FSA					
OCA					
OCR					
On-cell touch					
Over coat(on-cell touch)					
Polarizer					
Polyimide					
Process Film					
PSPi					
Substrate glass					
Thin film encapsulation					
Ultra thin glass					
<b>Grand Total</b>					



## ■ Components & Materials Market Usage Forecast

Nation	(All)	▼
Company	(All)	▼
Application	(All)	▼
Substrate type	(All)	▼

M&C	Unit	Value				
		2021	2022	2023	2024	2025
2D glass	million ea					
3D glass	million ea					
Add-on Touch	million ea					
Carrier glass	1,000,000 m2					
Colorless polyimide	million ea					
Complex sheet	1,000,000 m2					
Driver IC&COF	million ea					
Encapsulation glass	1,000,000 m2					
Frit glass	ton					
Metal Foil & FSA	1,000,000 m2					
OCA	million ea					
OCR	ton					
On-cell touch	1,000,000 m2					
Over coat(on-cell touch)	ton					
Polarizer	million ea					
Polyimide	ton					
Process Film	1,000,000 m2					
PSPI	ton					
Substrate glass	1,000,000 m2					
Thin film encapsulation	ton					
Ultra thin glass	million ea					

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5. Usage Forecast





# Reference Guide

## Application Covered

- Smartphone
- TV

## Nation Covered

- Korea
- China

## 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

## Actual and Forecast

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

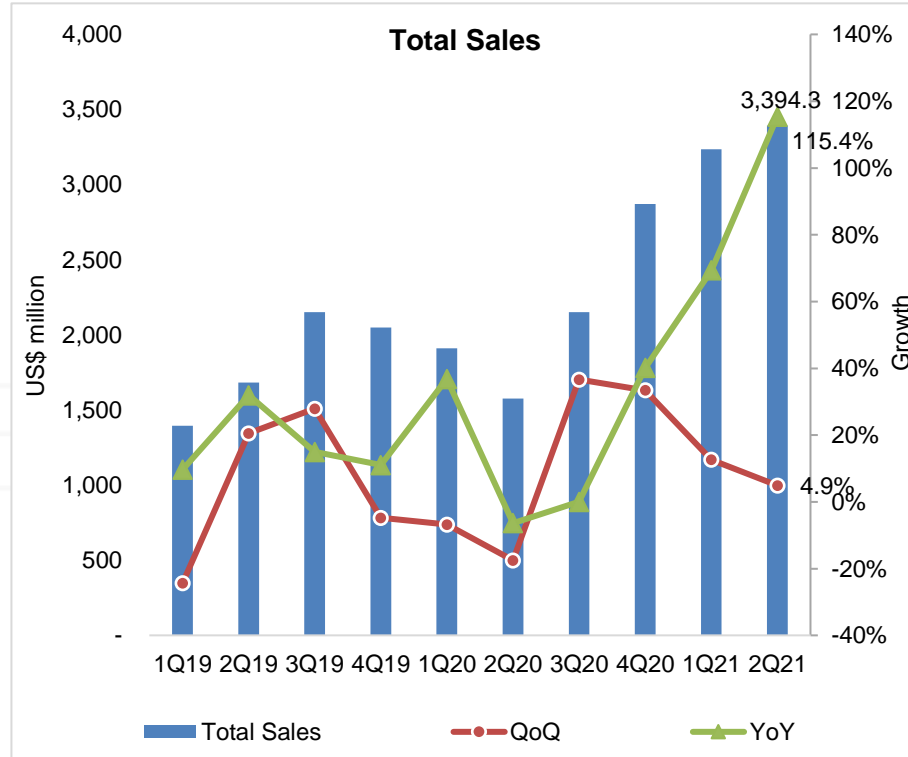
## Unit

- Revenue : US\$ millions
- Volume : kg, ea, m<sup>2</sup>



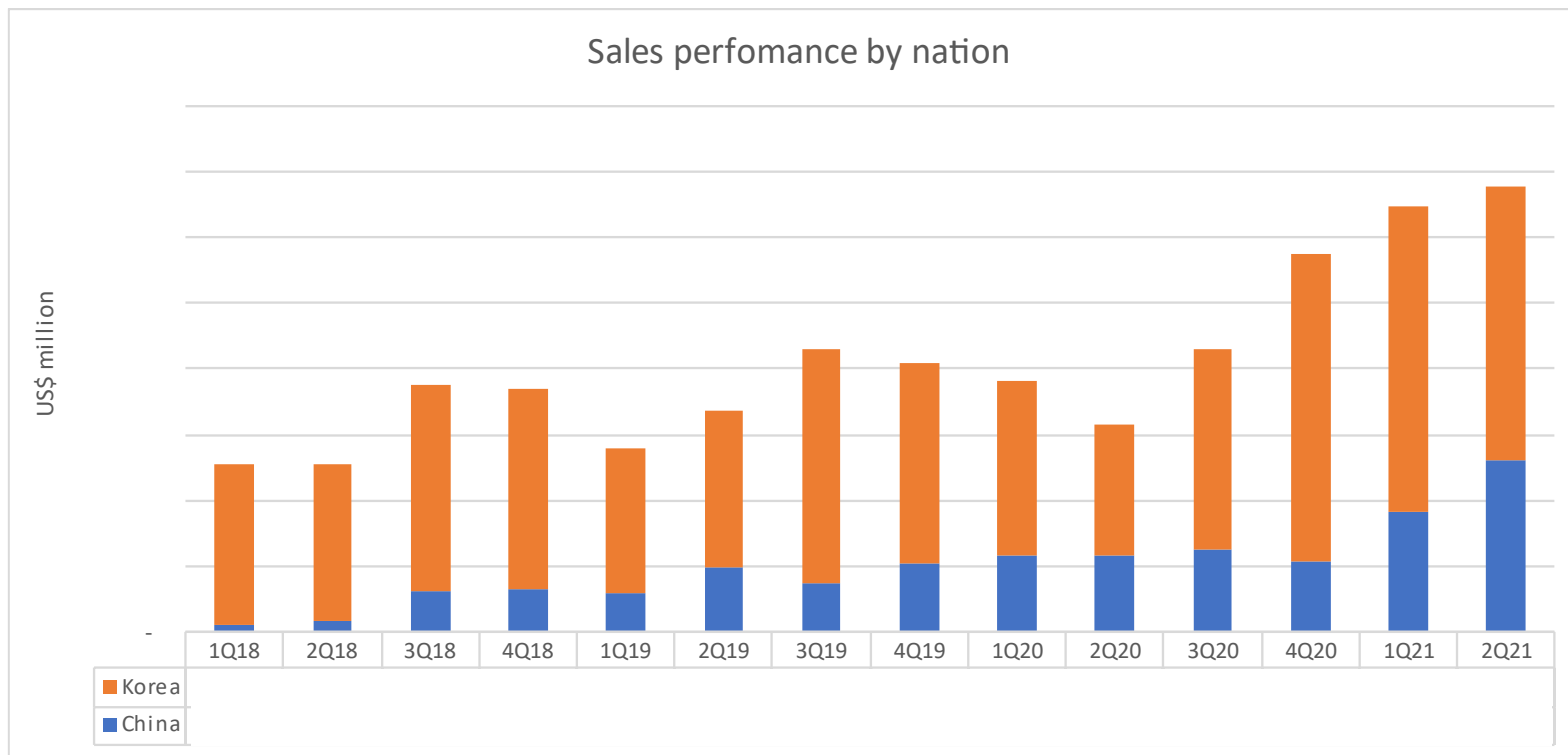
# Sales Performance

- 2021년 2분기 부품소재 구매액은 33.9억 달러로 집계되었음.
- 2021년 2분기 부품소재 시장은 전 분기 대비 4.9% 상승하였으며, 전년 동분기 대비 115.4% 상승한 수치임.
- 전년 동분기 대비 부품소재 시장이 성장한 가장 큰 이유는 코로나 사태의 회복으로 분석됨.
- 업체별로 삼성 디스플레이의 부품소재 구매액은 15.7억 달러로, 전체 시장의 46.2%를 차지하였음.
- BOE의 부품소재 구매액은 6.6억 달러로 전체 중 19.4%의 비율을 차지하였으며, LG 디스플레이는 5.2억 달러 규모의 소재를 구매하며 전체 시장 중 15.4%의 비율을 차지하였음.
- OCA는 2021년 2분기에 4,100만 달러의 시장을, 공정용 필름은 6,100만 달러의 시장을 형성하였음.



Source : Quarterly AMOLED Materials and Components Market Tracker, 3Q21

# Sales Performance by Nation



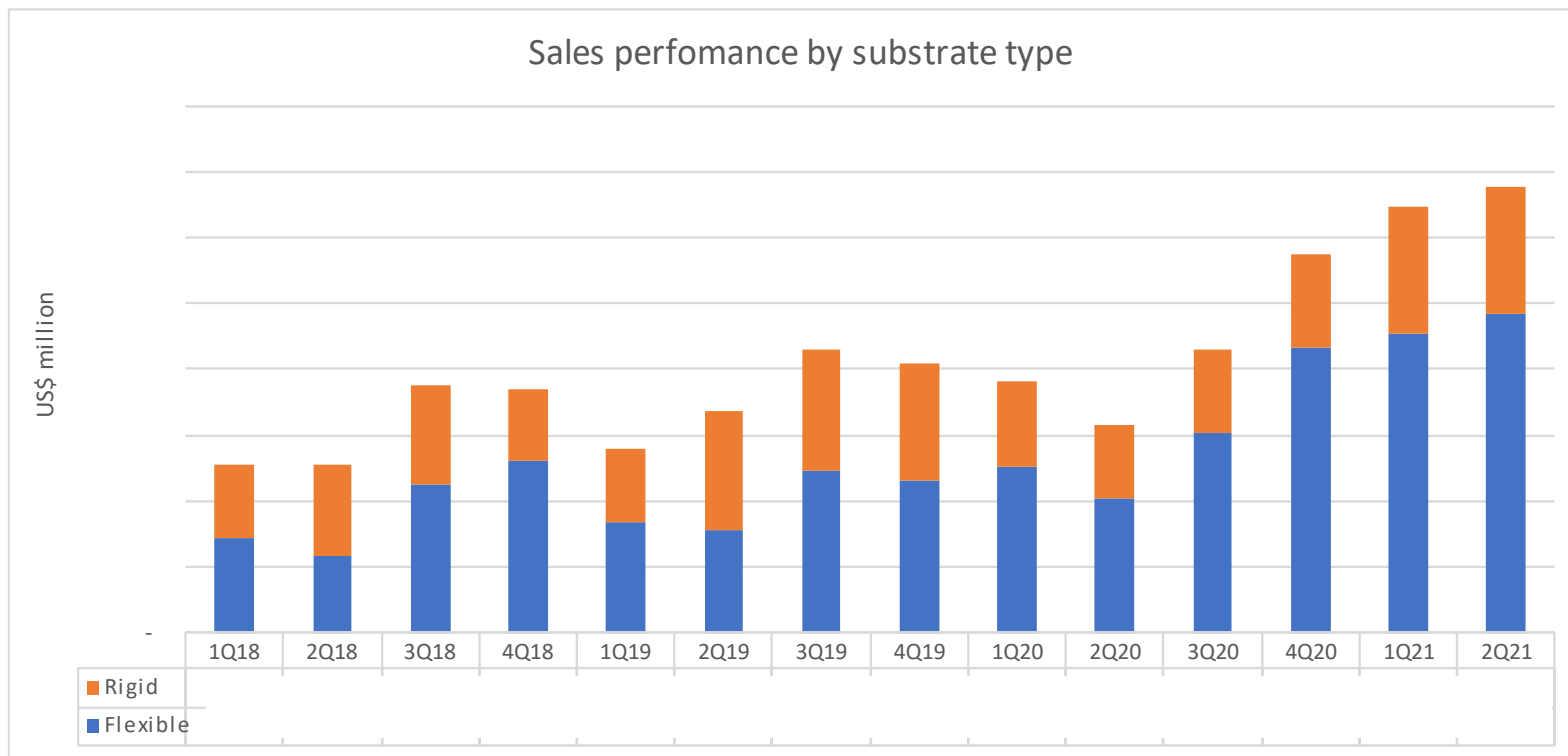
Source : Quarterly AMOLED Materials and Components Market Tracker, 3Q21

# Sales Performance by Company



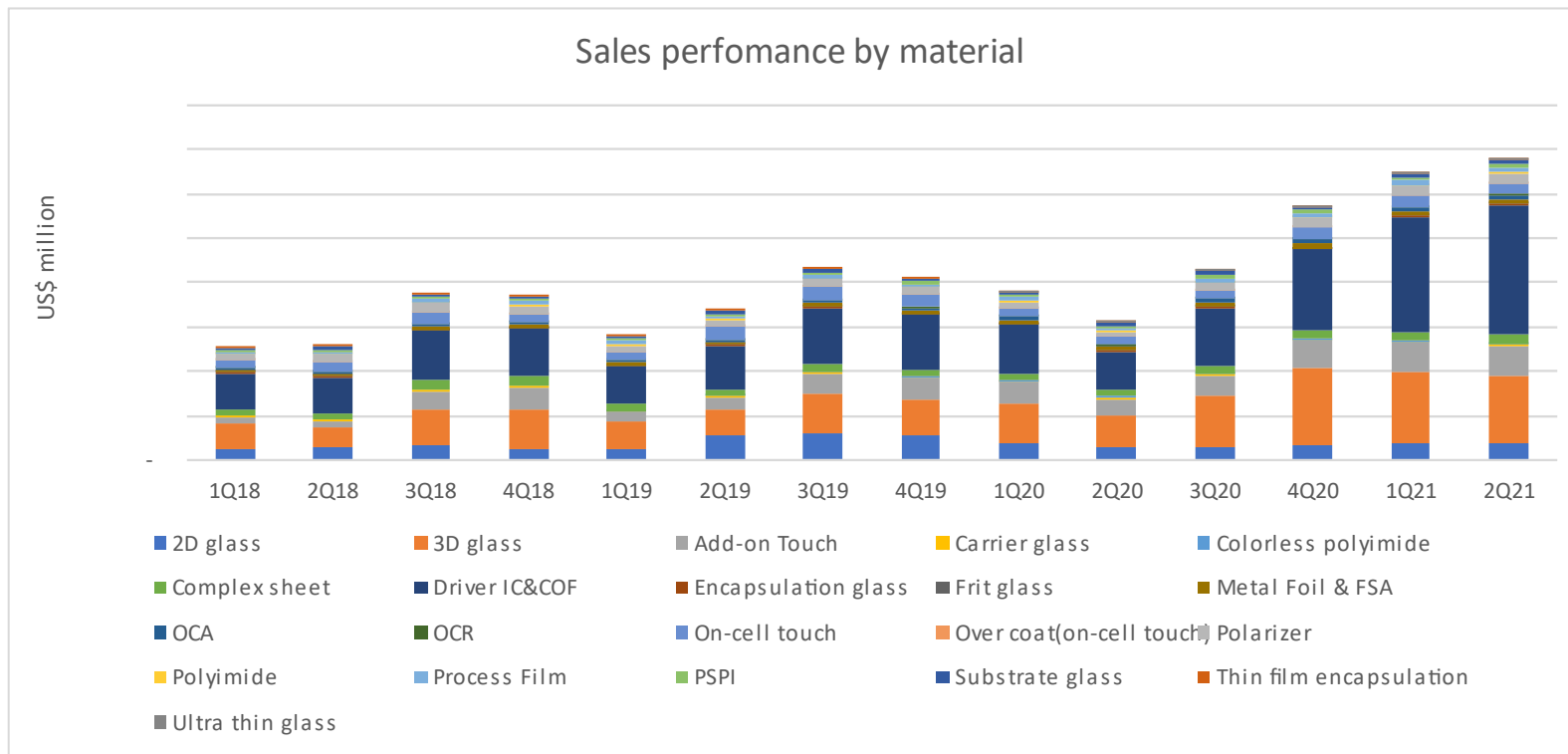
Source : Quarterly AMOLED Materials and Components Market Tracker, 3Q21

# Sales Performance by Substrate Type



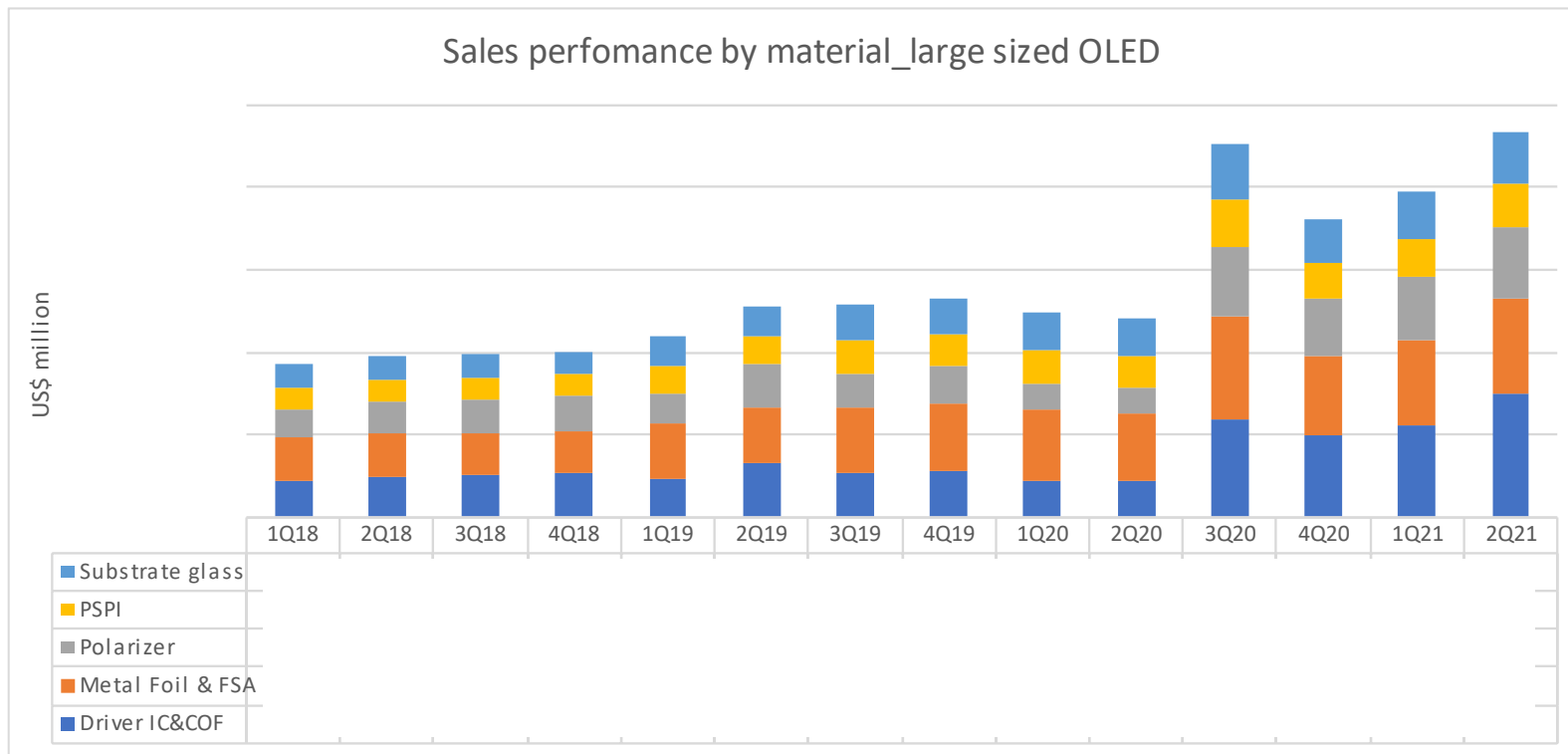
Source : Quarterly AMOLED Materials and Components Market Tracker, 3Q21

# Sales Performance by Material



Source : Quarterly AMOLED Materials and Components Market Tracker, 3Q21

# Sales Performance by Material\_Large Sized OLED



Source : Quarterly AMOLED Materials and Components Market Tracker, 3Q21



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