

# Quarterly Small OLED Display Market Track Sample

2Q, 2022

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# Table of Contents

- 1. Reference Guide**
- 2. Quarterly Issue**
- 3. Total Performance Summary**
- 4. Quarterly Performance by Company**
- 5. Quarterly Performance by Application**
- 6. Market Forecast**

# 1. Reference Guide

## Application Covered

- Smartphone
- Foldable phone
- Watch

## Substrate Covered

- Flexible OLED
- Rigid OLED

## Nation Covered

- Korea
- China
- Taiwan
- Japan

## Actual and Forecast

- Quarterly update
- History : 2-year, Forecast : 5-year

## Unit

- Shipments : M pcs
- Revenue : US\$ millions
- Average Selling Price : US\$
- Display Area : (million m<sup>2</sup>)

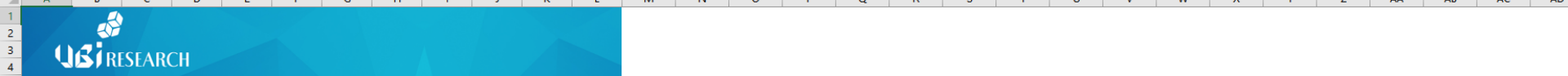
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**Small OLED Display Quarterly Market Track\_PIVOT**  
- 2Q22 Data Tables

- [Quarterly Capacity](#)
- [Quarterly Capacity Glass Area](#)
- [Quarterly Capacity Glass Area Chart](#)
- [PIVOT Quarterly Performance](#)
- [PIVOT Quarterly ASP Trend](#)
- [PIVOT Forecast](#)
- [Supply & Demand for Smartphone](#)

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General

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**UBI RESEARCH** Main

**Data\_Quarterly**

- Contents

> Glass Area

> Quarterly Capacity\_Glass Area (million m)

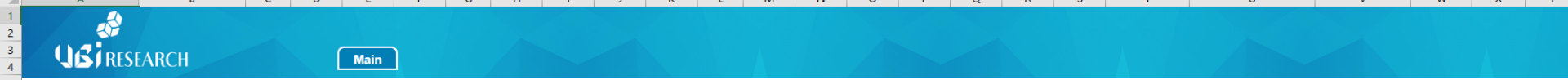
	Nation	Company	Fab. Location	Gen	Backplane	1Q20	2Q20	3Q20	4Q20	1Q21	2Q21	3Q21	4Q21	1Q22	2Q22	3Q22	4Q22	1Q23	2Q23	3Q23	4Q23	1Q24	2Q24	3Q24	4Q24	1Q25	2Q25	3Q25	4Q25	1Q26	2Q26	3Q26	4Q26				
13	Korea	Samsung Display	Tangjeong A2	5.5	LTFS TFT																																
14	Korea	Samsung Display	Tangjeong A3	6	LTFS TFT																																
15	Korea	Samsung Display	Tangjeong A3	6	LTPO TFT																																
16	Korea	Samsung Display	Tangjeong A4	6	LTFS TFT																																
17	Korea	LG Display	Paju E2	4	LTFS TFT																																
18	Korea	LG Display	Gumi E5	6	LTFS TFT																																
19	Korea	LG Display	Paju E6	6	LTFS TFT																																
20	Korea	LG Display	Paju E6	6	LTPO TFT																																
21	China	BOE	Ordos B6	5.5	LTFS TFT																																
22	China	BOE	Chengdu B7	6	LTFS TFT																																
23	China	BOE	Chengdu B7	6	LTPO TFT																																
24	China	BOE	Mianyang B11	6	LTFS TFT																																
25	China	BOE	Mianyang B11	6	LTPO TFT																																
26	China	BOE	Chongqing B12	6	LTFS TFT																																
27	China	BOE	Chongqing B12	6	LTPO TFT																																
28	China	CSOT	Wuhan T4	6	LTFS TFT																																
29	China	CSOT	Wuhan T4	6	LTPO TFT																																
30	China	Everdisplay	Shanghai	4.5	LTFS TFT																																
31	China	Everdisplay	Shanghai	6	LTFS TFT																																
32	China	Royole	Shenzhen	5.5	LTFS TFT																																
33	China	Tianma	Shanghai	5.5	LTFS TFT																																
34	China	Tianma	Wuhan	6	LTFS TFT																																
35	China	Tianma	Xiamen	6	LTPO TFT																																
36	China	Truly	Huizhou	4	LTFS TFT																																
37	China	Truly	Renshou	6	LTFS TFT																																
38	China	Visionox	Kunshan V1	5.5	LTFS TFT																																
39	China	Visionox	Guan V2	6	LTFS TFT																																
40	China	Visionox	Hefei V3	6	LTFS TFT																																
41	China	Visionox	Hefei V3	6	LTPO TFT																																
42	Japan	Japan Display	Mobara	6	LTFS TFT																																
43	Japan	Sharp	Sakai	4.5	LTFS TFT																																
44	Taiwan	AUO	Linkou	3.25	LTFS TFT																																
45	Taiwan	AUO	Singapore	4	LTFS TFT																																



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### Quarterly Shipment Performance

- Contents  
> Pivot of quarterly shipment performance (Mpcs)

Nation (All) [v]  
 Substrate (All) [v]  
 Size (All) [v]

Application	Company	Mpcs																	
		1Q18	2Q18	3Q18	4Q18	1Q19	2Q19	3Q19	4Q19	1Q20	2Q20	3Q20	4Q20	1Q21	2Q21	3Q21	4Q21	1Q22	
Smart Phone	LG Display	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
	Samsung Display	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
	AUO	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
	BOE	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
	CSOT	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
	Tianma	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
	Truly	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
	Visionox	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
Watch	EverDisplay	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
	LG Display	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
	Samsung Display	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
	JDI	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
	AUO	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
	BOE	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
Foldable Phone	Tianma	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
	Visionox	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
	EverDisplay	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
	Samsung Display	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...
<b>Total</b>		...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...	...

### Quarterly Revenue Performance

- Contents  
> Pivot of quarterly revenue performance (US\$ million)

Nation (All) [v]  
 Substrate (All) [v]  
 Size (All) [v]

Application	Company	US\$ million		
		1Q18	2Q18	3Q18
Smart Phone	LG Display	...	...	...
	Samsung Display	...	...	...
	AUO	...	...	...
	BOE	...	...	...
	CSOT	...	...	...
	Tianma	...	...	...
	Truly	...	...	...
	Visionox	...	...	...
Watch	EverDisplay	...	...	...
	LG Display	...	...	...
	Samsung Display	...	...	...
	JDI	...	...	...
	AUO	...	...	...
	BOE	...	...	...
Foldable Phone	Tianma	...	...	...
	Visionox	...	...	...
	EverDisplay	...	...	...
	Samsung Display	...	...	...
<b>Total</b>		...	...	...

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### Yearly Forecast Shipment

- Contents

> Pivot of forecast shipment (Mpcs)

Nation (All) Substrate (All)

Company	Application	M pcs				
		2022	2023	2024	2025	2026
AOO	Watch					
BOE	Foldable Phone					
	Smart Phone					
	Watch					
CSOT	Smart Phone					
EDO	Smart Phone					
	Watch					
JDI	Watch					
LG Display	Smart Phone					
	Watch					
Samsung Display	Foldable Phone					
	Smart Phone					
	Watch					
Tianma	Smart Phone					
	Watch					
Visionox	Foldable Phone					
	Smart Phone					
	Watch					
<b>Total</b>						

### Yearly Forecast Revenue

- Contents

> Pivot of forecast revenue (US\$ million)

Nation (All) Substrate (All)

Company	Application	US\$ million				
		2022	2023	2024	2025	2026
AOO	Watch					
BOE	Foldable Phone					
	Smart Phone					
	Watch					
CSOT	Smart Phone					
EDO	Smart Phone					
	Watch					
JDI	Watch					
LG Display	Smart Phone					
	Watch					
Samsung Display	Foldable Phone					
	Smart Phone					
	Watch					
Tianma	Smart Phone					
	Watch					
Visionox	Foldable Phone					
	Smart Phone					
	Watch					
<b>Total</b>						



