OLED Display Forecasts 2016-2026: The Rise of Plastic and Flexible Displays

Description: OLED technology has recently gained significant market share in the display market. OLED displays are now mass produced for mobile phones, tablets, TVs, and wearables. The author forecasts the market for all types of OLED displays will reach nearly $16bn this year and will grow to $57bn in 2026.

The latest evolution is plastic and flexible displays. Compared to conventional glass-based displays, plastic AMOLED panels are much thinner and lighter, enabling either slimmer devices or bigger batteries. Future flexible displays will also make foldable mobile devices a reality. The two main segments are currently smart phones and wearable devices such as smart watches. However, as the technology matures it will be possible to use those displays in other applications, such as automotive displays.

Both Samsung Display and LG Display have recently announced significant investment to expand their production capacity. The author has upgraded the forecast and now expects plastic and flexible displays to grow rapidly from a $2bn market this year to $18bn by 2020.

The rise of plastic and flexible displays will be accompanied by a shift from glass substrates to plastic substrates such as polyimide. However, glass-based displays will remain an important technology, especially in the TV segment where scale-up and cost reduction are still the main challenges.

New 4K OLED TVs were recently launched by LG and Panasonic to critical acclaim. However, some TV manufacturers are hedging their bets by investing in LCD panels enhanced with quantum dots. These so-called "quantum dot LCD" TVs will be positioned as a cheaper upgrade from existing sets. The author expects that new production technologies will make OLED more competitive, allowing the market for OLED TV panels to grow at 26% CAGR over the next decade.

New applications in wearable devices such as augmented reality (AR) and virtual reality (VR) are also coming to market and provide new opportunities for suppliers of OLED displays. Sony, Oculus, and HTC have already announced new VR headsets based on AMOLED technologies. For AR glasses, OLED microdisplays are a major contender against existing LCoS (liquid crystal on silicon) technology.

Based on a deep understanding of the technology roadmap and the existing bottlenecks, the author has forecasted the OLED display market in eight segments:

- Mobile phone displays
- Tablet and notebook displays
- TV panels
- Automotive and aerospace
- Wearable electronics
- Industrial and professional displays
- Microdisplays
- Other applications

The author has been tracking printed, organic, and flexible electronics since 2001. This report gives a unique perspective on the OLED display market, leveraging the full expertise of our analysts and the direct interviews with companies in the value chain.

The report will be useful to:

- Players in the OLED value chain who need detailed market forecasts
- End-users who wish to incorporate plastic and flexible displays in their products
- Investors who want a complete overview of the OLED display market

Key features of this report:

- Executive Summary available as a separate 36 slide presentation (PDF format)
- Detailed 10-year forecasts by market segment
- Detailed 10-year forecasts by display type (AMOLED rigid glass, AMOLED rigid plastic, AMOLED flexible,
Contents:

1. EXECUTIVE SUMMARY

2. INTRODUCTION
2.1. An industry transitioning from LCD manufacturing
2.2. Why flexible displays?
2.2.1. The need to differentiate
2.2.2. Enabling future form factors
2.3. Technology Roadmap: components needed for a flexible OLED display
2.4. Technology roadmap: OLED televisions

3. OLED STRATEGIES BY DISPLAY MANUFACTURERS
3.1. Samsung Display (SDC)
3.1.1. Novaled acquisition
3.1.2. Investment in production capacity
3.1.3. Increase in display size
3.1.4. The dilemma in TV
3.2. LG Display (LGD)
3.2.1. Focus on TV
3.2.2. Plastic OLED
3.2.3. Investment on both fronts
3.3. BOE
3.4. AU Optronics (AUO)
3.5. Shenzhen China Star Optoelectronics Technology (CSOT)
3.6. Visionox
3.7. Sony
3.8. Panasonic
3.9. Japan Display Inc (JDI)
3.10. JOLED
3.11. Foxconn - Sharp
3.12. Toshiba

4. PROGRESS IN PRINTED OLED DISPLAYS
4.1. Printed TFT backplanes
4.1.1. Why print TFTs?
4.1.2. Japan leading the R&D in printed TFTs
4.2. Growing availability of printable OLED materials
4.2.1. Polymer OLED from Cambridge Display Technology (Sumitomo)
4.2.2. Solution processed small molecules
4.3. Inkjet Printed OLED
4.3.1. Printing vs. vapour deposition
4.3.2. Panasonic
4.3.3. Sony
4.3.4. BOE
4.3.5. AU Optronics
4.3.6. Kateeva

5. MARKET SEGMENTATION FOR OLED DISPLAYS
5.1. Mobile displays
5.2. Computers: Tablets and Notebooks
5.3. TV and monitors
5.3.1. LGD taking the lead
5.3.2. Competing technologies
5.4. Wearable electronics
5.5. Automotive and Aerospace
5.6. Industrial and professional displays
5.7. Microdisplays
5. Others

6. MARKET FORECAST
6.1. Definition of OLED display technologies
6.1.1. AMOLED rigid glass
6.1.2. AMOLED rigid plastic
6.1.3. AMOLED flexible
6.1.4. PMOLED
6.1.5. Segmented
6.1.6. Microdisplays
6.2. Revenue forecast by market segment
6.3. Shipment forecast by market segment
6.4. Revenue forecast by technology
6.5. Shipment forecast by technology
6.6. Details by market segment
6.6.1. Mobile phones
6.6.2. Tablets/Notebooks
6.6.3. TV and monitors
6.6.4. Wearable devices
6.6.5. Automotive and aerospace
6.6.6. Industrial/Professional displays
6.6.7. Microdisplays
6.6.8. Others
6.7. Additional figures
6.7.1. Compound annual growth rate
6.7.2. Market share for each segment
6.7.3. Revenue forecast for Plastic and Flexible OLED displays

7. FLEXIBLE SUBSTRATES
7.1. Requirements
7.1.1. Key challenges of flexible substrates
7.1.2. Process temperature by substrate type
7.2. Benchmarking by material type
7.3. Company profiles
7.3.1. DuPont Teijin Films
7.3.2. ITRI
7.3.3. Samsung Ube Materials
7.3.4. Kolon Industries
7.3.5. Corning
7.3.6. AGC Asahi Glass

8. BACKPLANE TECHNOLOGY
8.1. Pixel circuit in Active Matrix backplanes
8.1.1. OLED displays are current driven
8.1.2. Amorphyx: replacing TFT with diodes
8.2. Semiconductor materials
8.2.1. Benchmarking of the main technologies
8.2.2. Organic TFT
8.2.3. Metal oxide TFT
8.3. Passive matrix OLED (PMOLED)
8.4. Company profiles
8.4.1. FlexEnable (formerly Plastic Logic)
8.4.2. CBrite
8.4.3. Arizona State University
8.4.4. SmartKem
8.4.5. Polyera
8.4.6. Flexink
8.4.7. Merck (EMD Chemicals)
8.4.8. BASF

9. FRONTPLANE: OLED LAYERS
9.1. Role of each layer
9.2. TADF
9.3. Shadow mask vs. White OLED
9.3.1. Fine metal mask (FMM)
9.3.2. White OLED approach
9.3.3. Yellow emitter with color filters
9.4. Pixel architecture for printed OLED
9.5. Subpixel layouts
9.6. Table of suppliers
9.7. Suppliers in China
9.7.1. Beijing Aglaia Technology Development Co
9.7.2. Borun New Material Technology Co. (Borun Chemical Co)
9.7.3. Jilin Optical & Electronic Materials Co
9.7.4. Visionox
9.7.5. Xi’an Ruilian Modern Electronic Chemicals Co., Ltd
9.8. Suppliers in Europe
9.8.1. Heraeus
9.8.2. Merck
9.8.3. Novaled
9.8.4. Cynora
9.9. Suppliers in Japan
9.9.1. Hodogaya
9.9.2. Idemitsu Kosan
9.9.3. JNC (ex Chisso)
9.9.4. Konica Minolta
9.9.5. Kyulux
9.9.6. Mitsubishi Chemical Corporation
9.9.7. Mitsui Chemicals
9.9.8. Nippon Steel & Sumikin Chemical
9.9.9. Nissan Chemical Industries
9.9.10. Sumitomo Chemical
9.9.11. Toray Industries
9.10. Suppliers in Korea
9.10.1. Cheil Industries
9.10.2. Daejoo Electronic Materials Company
9.10.3. Doosan Corporation Electro-Materials
9.10.4. Dow Chemical
9.10.5. Duksan Hi-Metal
9.10.6. LG Chem
9.10.7. Sun Fine Chemical Co (SFC)
9.11. Suppliers in Taiwan
9.11.1. E-Ray Optoelectronics
9.11.2. Luminescence Technology Co.
9.11.3. Nichem Fine Technology
9.12. Suppliers in USA
9.12.1. DuPont
9.12.2. Plextronics (Solvay)
9.12.3. Universal Display Corporation

10. ITO REPLACEMENT: TRANSPARENT CONDUCTORS
10.1. Developed for touch, used in displays
10.2. A range of technologies available
10.3. Table of suppliers
10.4. Company profiles
10.4.1. Blue Nano
10.4.2. Cambrios
10.4.3. CNano
10.4.4. Canatu
10.4.5. NanoIntegris
10.4.6. Heraeus
10.4.7. Agfa

11. BARRIER FILM TECHNOLOGY
11.1. Why encapsulation is needed
11.1.1. Organic semiconductors are sensitive to air and moisture
11.1.2. Requirements for barrier films
11.1.3. Different ways barriers are implemented
11.1.4. Dyad concept
11.2. Different barrier technologies available
11.2.1. Pros and cons of each approach
11.2.2. List of technology suppliers
11.3. Vitex Technology (Samsung)
11.4. Flexible glass
11.5. Atomic Layer Deposition (ALD)
11.5.1. Beneq
11.5.2. Encapsulix

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