

OLED AND LCD MARKETS: TECHNOLOGY, DIRECTIONS, AND MARKET ANALYSIS

Table of Contents

Chapter 1	Introduction	1-1
Chapter 2	Executive Summary	2-1
2.1	Introduction	2-1
2.2	Market Opportunities	2-4
Chapter 3	Profiles of LCD Companies	3-1
3.1	Equipment Manufacturers	3-1
3.2	Material Manufacturers	3-9
3.3	LCD Manufacturers	3-16
Chapter 4	Profiles of OLED Companies	4-1
4.1	Equipment Manufacturers	4-1
4.2	Material Manufacturers	4-9
4.3	OLED Manufacturers	4-19
Chapter 5	OLED Equipment Requirements And Trends	5-1
5.1	Introduction	5-1
5.2	Evaporation	5-4
5.3	Encapsulation	5-7

5.3.1	Chemical Vapor Deposition Technology	5-9
5.3.2	Atomic Layer Deposition Technology	5-10
5.3.3	Ink Jet	5-11
5.3.4	Other Encapsulation Methods	5-12
Chapter 6	LCD Equipment Requirements And Trends	6-1
6.1	Introduction	6-1
6.2	Microlithography	6-23
6.2.1	Proximity Printing	6-23
6.2.2	Scanning Projection	6-24
6.2.3	Step-and-Repeat	6-25
o	Image Field Stitching	6-28
o	Overlay	6-29
6.3	Deposition	6-30
6.3.1	CVD	6-30
6.3.2	Sputtering	6-38
6.4	Rapid Thermal Processing	6-43
6.5	Etch/Strip/Clean	6-45
6.5.1	Etching	6-45
o	Plasma Etching	6-45
o	Wet Chemical Etching	6-47
6.5.2	Photoresist Stripping	6-50
6.5.3	Cleaning	6-51
6.6	Inspection Systems	6-54
6.7	Test Systems	6-59
6.7.1	Technology Capabilities	6-59

o	Voltage/Capacitance Imaging	6-59
o	Ohmic/Continuity Test	6-59
o	Charge Sensing	6-60
o	Forward Admittance Sensing	6-60
o	E-Beam Test	6-60
6.7.2	Yield Improvements	6-64
6.8	Repair	6-65
Chapter 7	OLED Material Requirements and Trends	7-1
7.1	Introduction	7-1
7.2	Material Trends	7-4
7.3	Flexible Substrates	7-5
7.3.1	Film Polyimide	7-5
7.3.2	Solution Polyimide	7-5
Chapter 8	Material Requirements and Trends	8-1
8.1	Substrates	8-1
8.1.1	Material Types	8-1
8.1.2	Quality Issues	8-2
8.1.3	Trends	8-3
o	Larger Substrates	8-3
o	Thinner Substrates	8-3
o	Better Surface	8-3
o	Manufacturers	8-3
8.2	Liquid Crystals	8-6
8.3	Alignment Layer	8-10

8.3.1	Material Properties	8-10
8.3.2	Alignment Methods	8-11
8.3.3	Material Trends	8-17
8.4	Color Filters	8-19
8.4.1	Materials	8-19
8.5	Polarizer Films	8-26
8.5.1	Material Properties and Trends	8-26
8.6	Backplanes	8-34
8.6.1	Amorphous Silicon	8-34
8.6.2	LTPS	8-34
8.6.3	IGZO	8-37
Chapter 9	Display Market Forecast	9-1
9.1	Getting To Market	9-1
9.2	Market Forecast Assumptions	9-8
9.3	LCD Market Forecast	9-9
9.4	OLED Display Market Forecast	9-26
Chapter 10	Equipment Market Forecast and Trends	10-1
10.1	Lithography	10-1
10.2	Plasma Etching and Stripping	10-3
10.3	Thin Film Deposition	10-5
10.4	Wet Etching and Cleaning	10-7
10.5	Photoresist Processing	10-9
10.6	Inspection/Repair	10-11
10.7	Total Equipment Market	10-13

Chapter 11	Materials Market Forecast and Trends	11-1
11.1	OLED Materials Market	11-1
11.1.1	Introduction	11-1
11.1.2	Deposition Methods	11-3
11.1.3	Inkjet Materials	11-6
11.1.4	Residue Cleaning	11-11
11.2	LCD Materials Market	11-21
11.2.1	LCD Glass Market	11-21
11.2.2	Gases Market	11-26
List of Figures		
6.1	Schematic of Step-and-Repeat Aligner	6-26
6.2	Schematic of Hot-Wall LPCVD Reactors	6-31
6.3	Schematic of PECVD Techniques	6-33
6.4	Diagram of Magnetron Sputtering Source	6-40
6.5	Diagram of Rapid Thermal Processor	6-44
6.6	Process Flow for Cell/Module Inspection	6-56
8.1	Illustration Of Typical Liquid Crystal Phases	8-7
8.1	Comparison of Color Filter Methods	8-20
9.1	Worldwide Large Panel Display Market Forecast	9-17
9.2	Worldwide Large-Size TFT Shipments By Region	9-19
10.1	Worldwide TFT-LCD Equipment Market Growth	10-17
11.1	OLED Structure	11-2
11.2	Market Shares Of Suppliers For ETL Layer	11-13
11.3	Market Shares Of Suppliers For Red Materials	11-14

11.4	Market Shares Of Suppliers For Green Materials	11-15
11.5	Market Shares Of Suppliers For Blue Materials	11-16
11.6	Market Shares Of Suppliers For HTL Layer	11-17
11.7	Market Shares Of Suppliers For HIL Layer	11-18
11.8	LCD Glass Output by Supplier	11-23
11.9	LCD Glass Output Market Share	11-24
11.10	Electronic Specialty Gases (ESGS) Market	11-27
11.11	Electronic Bulk Gases (EBGS) Market	11-28
11.12	Gases Used To Manufacture Displays	11-29
List of Tables		
6.1	Investment for Large-size TFT-LCD Panel Plants	6-7
6.2	Causes of Defects in TFT LCD Manufacturing	6-15
7.1	Common Wafer Processing Chemicals	7-49
7.2	Advantages and Disadvantages of Various	
	Cleaning Methods	7-52
8.1	Desired Nematic LC Material Characteristics	8-14
8.2	Characteristics of Aligning Materials	8-17
9.1	Worldwide LCD Display Market Forecast	9-16
9.2	Major LCD Panel Makers Market Share 2008-2016	9-22
9.3	Major LCD Panel Makers Capacity	9-24
9.4	Major LCD Panel Makers Capacity Forecast	9-25
9.5	OLED Capacity Expansion Plans	9-28
9.6	OLED Display Market Forecast by Applications	9-30
9.7	OLED Display Market Forecast by Applications	9-31
9.8	OLED Oversupply Calculations	9-33
10.1	Worldwide TFT-LCD Stepper/Scanner Market Forecast	10-2

10.2	Worldwide Market Forecast of TFT-LCD Plasma Etching	
	Systems	10-4
10.3	Forecast of Worldwide TFT-LCD Thin Film	
	Deposition Equipment Market	10-6
10.4	Forecast of Worldwide TFT-LCD Wet Etching and Cleaning	
	Equipment Market	10-8
10.5	Forecast of Worldwide TFT-LCD Photoresist Processing	
	Equipment Market	10-10
10.6	Forecast of Worldwide TFT-LCD Inspection/Repair	
	Equipment Market	10-12
10.7	Forecast of Worldwide TFT-LCD Equipment Market	10-16
10.8	Worldwide Equipment Market Shares	10-19
11.1	Market Forecast Of OLED Materials	11-19
11.2	LCD Glass Shipment Forecast	11-22
11.3	TFT-LCD Material And Component Revenues	11-8