Notebook and all-in-one PCs driving touch screen growth

Notebook and all-in-one PCs will help drive total touch screen module revenue to nearly $16 billion in 2012, and almost double to $31.9 billion by 2018, according to the NPD DisplaySearch 2012 Touch Panel Market Analysis [1].

Touch screens used in small/medium devices, such as smart phones and tablet PCs, will continue to grow as well. Tablet PCs are the fastest growing application for touch, with 2011 shipments tripling to 79.6 million units. Growth continues to be strong, and NPD DisplaySearch forecasts that more than 130 million touch screens will be shipped for tablet PCs in 2012, and over 190 million in 2013. Revenues for touch screens in tablet PCs are expected to grow by more than $3 billion in 2013.

“Over the next few years, demand for thin, lightweight, and lower-cost touch devices will drive strong touch screen growth in display applications,” noted Jennifer Colegrove, PhD, Vice President of Emerging Display Technologies, NPD DisplaySearch.

Figure 1: Touch Screen Module Revenue Forecast

Source: NPD DisplaySearch 2012 Touch Panel Market Analysis [1]

Large screen touch demand rising
Touch penetration is forecast to increase dramatically in larger size (>10”) devices, such as convertible/hybrid notebook PCs. Several Ultrabook™ mobile PCs (promoted by Intel) will adopt touch screens by the end of this year. In addition, Microsoft Windows 8 has touch functionality designed in. Its release, scheduled for release later this year, is expected to accelerate touch screen adoption in PCs. NPD

DisplaySearch forecasts that the touch screen penetration rate in notebook PCs will jump fourfold, from 2% in 2011 to approximately 8% in 2013.

Over the next few years, adoption by all-in-one PCs and automobile monitors are expected to be leading contributors to touch screen market growth. Touch technologies with high transmittance, low power consumption, multi-touch, or gesture recognition will benefit the most from these applications.

Touch technology evolving
Projected capacitive growth has been explosive since being popularized by Apple in 2007, and many tablet PCs manufacturers have adopted it. This technology became the top touch solution in 2010 in terms of revenue. Due to the pressure to reduce cost and materials, conventional add-on type projected capacitive touch is evolving in three directions: sensor-on-cover, on-cell, and in-cell.

Supply of sensor-on-cover (SOC) touch technology is rapidly ramping up, with more than 20 suppliers in 2012. Shipments of SOC touch modules are expected to grow more than seven-fold from 2011 to 2013, and revenues are forecast to surpass $2.8 billion in 2013. NPD DisplaySearch forecasts that SOC will surpass add-on type projected capacitive touch and become the leading touch technology in 2015 in terms of revenue.

The NPD DisplaySearch 2012 Touch Panel Market Analysis [1] report is a comprehensive analysis of touch panel technologies and their market forecasts through 2018. This report has a detailed breakdown of 23 applications (with TV applications added this year), 12 touch technology categories (including sensor-on-cover and gesture-in-air), and nine size categories. It also has details on touch controller ICs, the sensor market, shipments by area, and forecasts for multi-touch through 2018.

DisplaySearch surveyed over 200 suppliers of touch screen modules, controller ICs, ITO film, and other components to produce the 2012 Touch Panel Market Analysis [1] report. These firms are profiled in the report along with 2011 historical shipments and revenues for more than 110 touch screen suppliers.

www.displaysearch.com [2]

Links:
[1] http://www.displaysearch.com/cps/rde/xchg/displaysearch/hs.xsl/touch_panel_market_analysis.asp
[2] http://www.displaysearch.com/