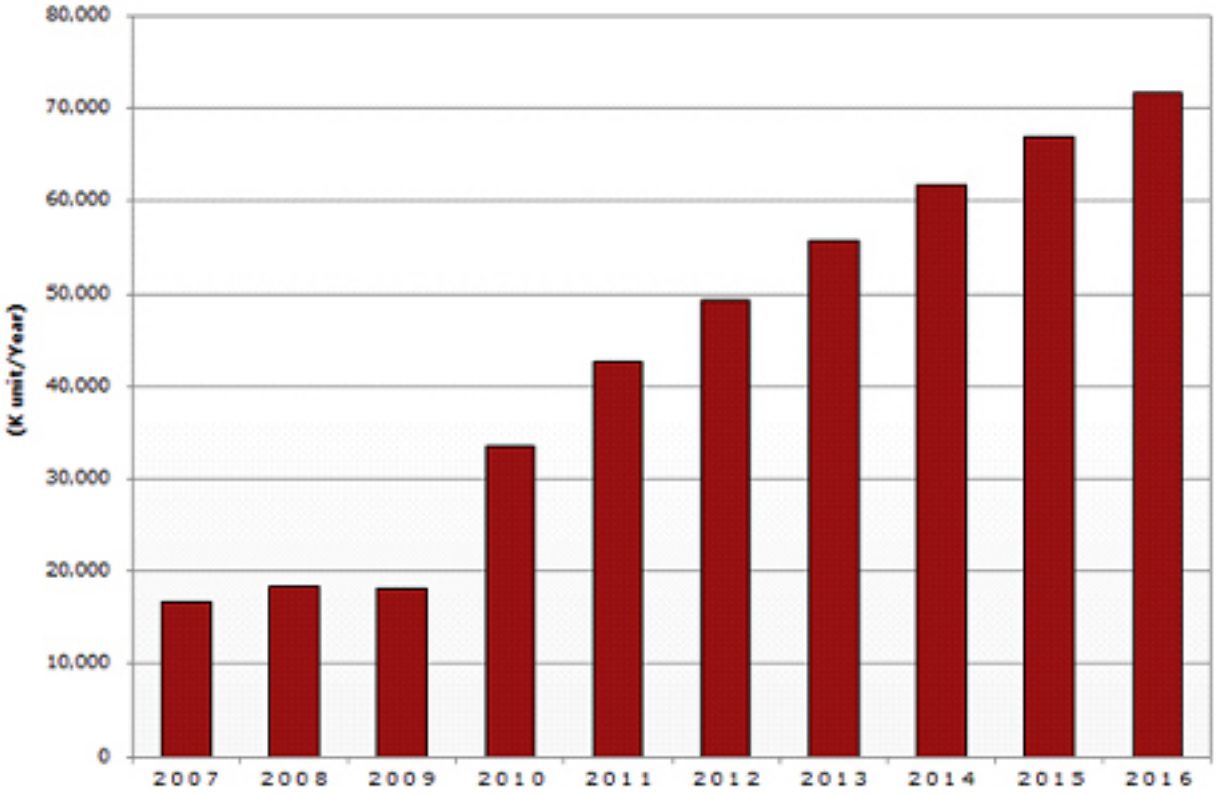
Automotive display demand to reach 70 million by 2016

Shipments of TFT-LCDs (thin film transistor-liquid crystal display) used in automobiles for devices such as navigation and rear seat DVD players increased 16% Y/Y to 49 million in 2012, according to the NPD DisplaySearch 2012 *Automotive Displays Report* [1]. Shipments are expected to increase to 70 million by 2016. This is not surprising since commuters spend up to three hours in their automobiles every day and demand is on the rise for automotive displays that integrate convenience, safety, and functionality.

“Consumer demand is driving the production of smarter and more efficient automobiles, requiring automotive displays that increase functionality and safety,” said Hiroshi Hayase [2], Vice President of Small/Medium Displays at NPD DisplaySearch. “Features such as navigation, audio and air-conditioning control, rearview monitors, and eco-driving displays provide safety, energy information, and other conveniences while on the road.”

Figure 1: Shipments and Forecast for Automotive TFT LCD (2007-2016)



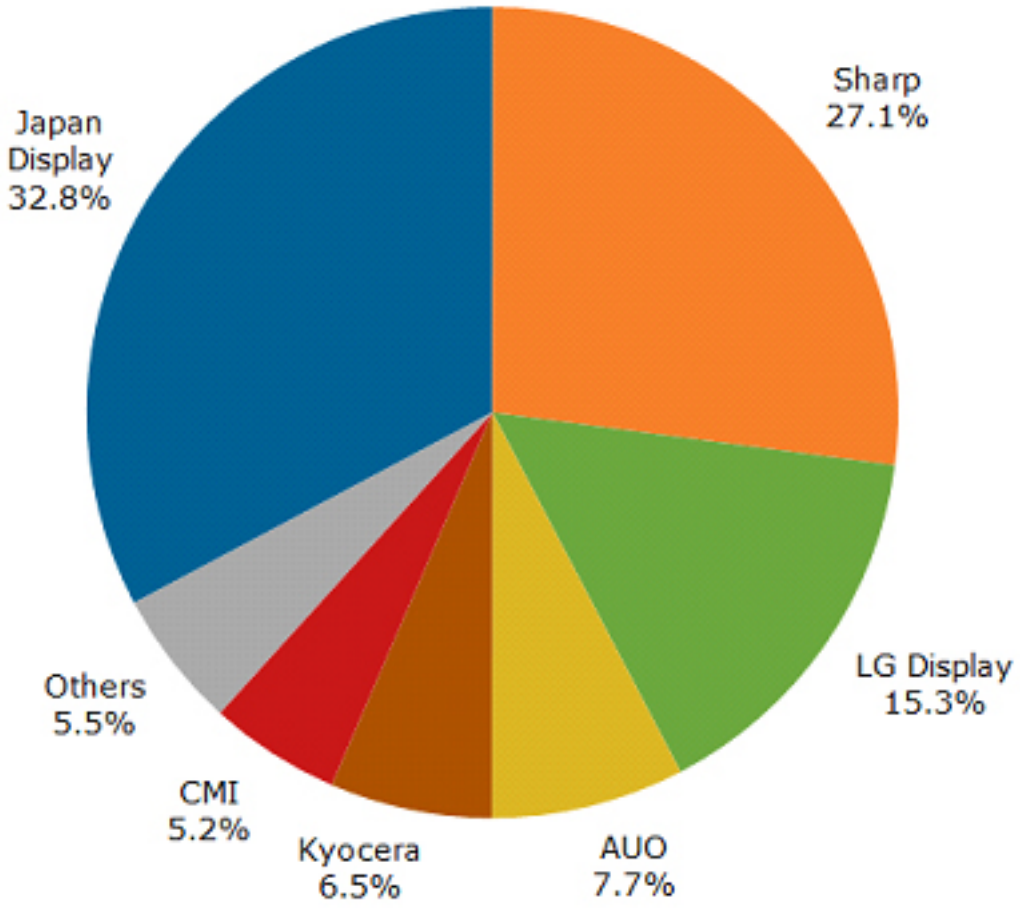
Source: NPD DisplaySearch *Automotive Displays Report*

A major factor propelling automotive displays is the growing production of hybrid and electric vehicles. Helping fuel the fire is demand for replacements of older single-function displays, which use passive matrix LCDs.

Japan continues to dominate the production of automotive TFT LCD panels, especially in high-grade automobiles, while the United States and Europe are making headway in mid-grade and small-size vehicles. In 2012, Japan Display became top automotive TFT LCD maker, followed by Sharp and LG Display. Automotive TFT LCD panel demand in Japan was led by car navigation set makers, including Panasonic, Alpine, and Pioneer. However, demand from set makers in the U.S. and Europe were driven by cluster component makers, including Continental AG, BP/Bosch, Ford, and Johnson Controls.

“Interestingly, we’ve noticed that automotive display demand in Japan favors car navigation systems, while demand for TFT LCD panels for automobiles in the United States and Europe favors in-console displays,” added Hayase. “Regardless of the type of automotive display technology, we are seeing trends toward more cars incorporating this technology, so we anticipate continued growth in this segment.”

Figure 2: Shipment Share Forecast for Automotive TFT-LCD Makers (2012)



Source: NPD DisplaySearch *Automotive Displays Report*

www.displaysearch.com [3]

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