

Display Parts & Components



June 2009

US\$495

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China manufacturer profiles

Detailed profiles of 26 verified suppliers and contact details of an additional 11 exporters

Product & price trends

Prices and specifications of 91 top-selling export products

Supply centers & market trends

Coverage of leading and emerging supply centers, plus insight into capacity, output and R&D

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DISPLAY PARTS & COMPONENTS

Supplier capability in China

EXECUTIVE SUMMARY

Rising demand for energy-efficient, environment-friendly lighting products is forecast to fuel growth in China's display parts and components industry. The country's LED output has been expanding by 30 percent in the past five years, and suppliers are confident the momentum will continue despite the challenges posed by the current economic climate.

Makers are broadening their product and application range in preparation for increased orders, thereby offering the entire scope of LED components, displays, panels and modules. The LED selection from China now consists of SMD and high-power LEDs, and LCD and CCFL backlights and sidelights. LED displays and LCD panels are also available, as are modules in both types. Many companies offer CRTs, OLEDs and 7-segment LEDs, ELs and plasma panels as well.

Among these, LED displays are the strongest. China is currently the largest manufacturing hub for the line, with output this year estimated to rise by 39 percent.

LCD panel makers are maximizing opportunities in the TN/STN and TFT sectors as large foreign companies continue to reduce production. Many are eyeing the home, automotive and industrial segments.

The global market for high-power LEDs is projected to exceed \$1.9 billion by 2011, and China is expected to account for at least a fifth of the world's supply, as it has in recent years. In the SMD LED segment, makers are exploring India, Japan and certain segments in Europe and the US even as they step up domestic marketing strategies.

Superflux LED manufacturers are counting on the demand upturn for energy-efficient lighting to buttress the line. Output is projected to exceed the 7 billion units produced in 2008.

LED lamp and cluster light makers are gearing up for growth as

more countries shift from traditional incandescent lamps to LED-based lighting technology.

The following are some of the key trends observed in China's display parts and components industry:

- Prices are expected to decrease in coming months as companies boost competitiveness. Some suppliers will raise quotes to recoup losses from slowing overseas sales.

- Export revenue is forecast to continue rising despite lower demand in key markets such as the US. The upswing will be fueled by the growing awareness about low-cost, environment-friendly lighting technologies.

- Product development is focused on displays and modules with a wider viewing angle, improved resolution and faster response time. Makers will also release LED components with enhanced brightness and contrast.

- Companies are grappling with IPR issues and the lack of industry standards. The continued support of industry associations and the central government, however, is helping them address these problems.

- Many makers are increasing manufacturing efficiency and speeding up time to market. To cushion the impact of fluctuating exchange rates, more suppliers are locking in the conversion value when orders are placed.

This report covers LEDs, components, displays and modules, LCD panels and modules, and LCD backlights.

The Industry Overview section discusses developments in China's market. It also mentions key trends and R&D priorities in coming months.

The majority of companies are based in Guangdong province, which accounts for almost 80 percent of the total output.

In this report

- 26 in-depth company profiles
- 11 additional suppliers
- 91 top-selling export products
- Supplier demographics
- Supplier survey
- Industry statistics & charts

METHODOLOGY

To produce this report, Global Sources surveyed a wide range of suppliers. Rather than focus simply on high-profile makers, we compiled a representative sample of large, midsize and emerging manufacturers. All profiled companies are export-oriented professional suppliers that may or may not be clients of Global Sources.

The selection of suppliers is designed to reflect the composition of the industry in China in terms of geographic spread, business type and company ownership.

For in-depth company profiles, our research teams interviewed senior executives and export managers who discussed their recent performance and provided price, R&D, production and export forecasts for the next 12 months. The interviews were done in person, by phone or e-mail.

In each case, companies were required to answer specific questions designed to verify their manufacturing and export credentials, including their production and export statistics, and a breakdown of exports by product type and market. Our production checklist details the product-specific manufacturing capability of each supplier.

All profiled suppliers participated in a survey designed to provide insight into product and price trends, and challenges facing the industry in the next 12 months. All survey questions are single choice. Results were calculated based on the actual number of valid responses to each question.

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INDUSTRY OVERVIEW

China is a major production center for displays and components. The LED industry alone has been expanding 30 and 20 percent in terms of output and sales, respectively, in the past five years. Even though demand is expected to make a slight downturn due to the current economic environment, the wide range of applications ensures long-term growth.

The selection of LED products from China consists of SMD and high-power LEDs and units of all colors and packaging, lights, cluster lamps, strips, indicators and modules. LCD and CCFL backlights and sidelights also fall loosely under this category.

LED displays and LCD panels and modules are mainly classified as displays. Some makers regard the last two as parts along with CRTs, OLEDs and 7-segment LEDs, ELs and plasma screens.

LED displays are the strongest of these categories at present. China is currently the largest manufacturing hub in this sector. Output this year is expected to increase by 39 percent to reach a value of \$1.64 billion.

Strong demand and widening applications continue to spur growth. Many companies are planning capacity expansions in preparation for a rise in orders. The broadening product range now includes indoor, outdoor and combination indoor/outdoor models.

LED displays are making significant inroads into the lucrative commercial signage and advertising industries. Models for outdoor applications, in particular, are poised to grab the lion's share as media companies shift from traditional marketing methods and governments substitute LEDs for incandescent and CCFL lamps in public places and highways.

Market growth

China's LED sector is generally young, but makers are optimistic of sustainable growth despite the current financial crunch as demand for alternative lighting technology soars. Suppliers of LCD panels, meanwhile, are taking advantage of reduced output by major international companies to push their TN/STN line and TFT expansion.

Supplier summary

Suppliers surveyed	26
Export sales	\$178.1mn
Export ratio	56%
OEM business	31%
Capacity utilized	61%
Annual R&D spending	\$23.2mn
Full-time employees	14,995

Data: All surveyed suppliers

Under efforts to protect their foothold in the TN/STN sector, manufacturers are improving product performance and broadening application in the home, automotive and industrial segments. They are confident the line's price advantage and high customization capability will keep output stable for years to come.

High-power LEDs made up 15 percent of the global LED supply in 2008, according to the Taiwan Industrial Economics & Knowledge Center. Despite the modest share, the line is one of the fastest-growing in its category, with a 56 percent CAGR in 2004-07. The worldwide market is projected to exceed \$1.9 billion by 2011, equivalent to about 1.8 billion units.

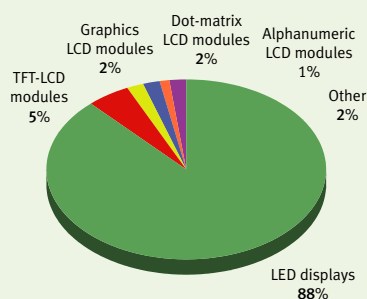
Global Sources online metrics

Optoelectronic displays

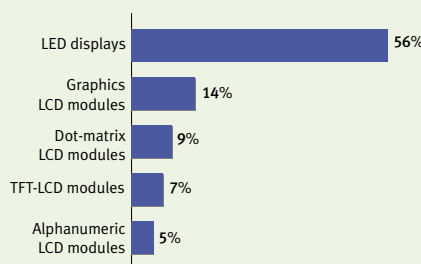
Online metrics are taken from buyer and supplier activity in the featured product group on www.globalsources.com in the month preceding publication of this update.

- **Buyer requests** track total inquiries from our worldwide community of more than 750,000 buyers.
- **Product profiles** represent the total number of unique products available from suppliers in our online catalogs.
- **New product postings** indicate the number of new product profiles added by suppliers during the period.

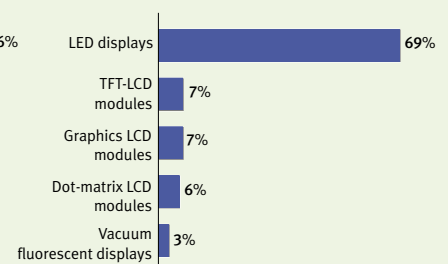
Top buyer requests



Top product profiles



Top new product postings



Percent of all online activity for this product group

Blueview Electronics-optic Technology Co. Ltd

Sichuan-based Blueview specializes in the development and production of LED displays and modules. The line accounts for 94 percent of the company's total sales.

The supplier has 170 workers and operates a 3,000sqm factory. It can manufacture up to 400,000 LED displays and modules a month, with actual output reaching 300,000 units or 75 percent of capacity. Shipping 180,000 units monthly, Blueview generated \$4.5 million in export sales in 2008. The major export destination was the Middle East.

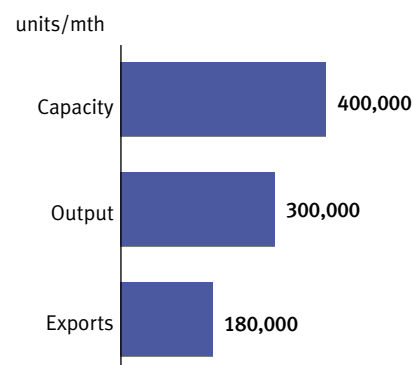
The company projects its export revenue will grow by more than 20 percent in the next 12 months. This year, the EU will be Blueview's target market.

A team of eight engineers is in charge of product development. On average, the company invests \$20,000 in R&D annually. This year, its R&D focus will be on models with enhanced brightness.

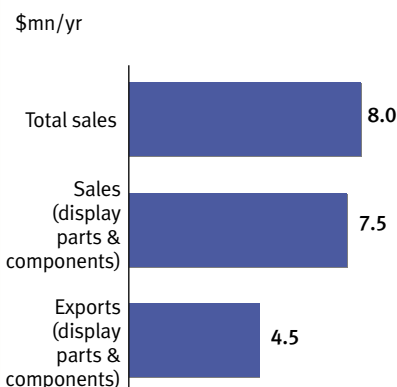
Blueview regards price competition as its biggest challenge in 2009. It expects prices to drop by less than 5 percent in the next six months.

Profile

Production



Sales



Contact details

Business contact

WANG Maggie

Phone

(86-28) 8707-9939

Fax

(86-28) 8707-9893

E-mail

info@blueview.com

blueviewled@globalsources.com

URL

www.blueview.cn

www.globalsources.com/blueview.co

Address

A7 Jiaolong Industrial Zone, Chengdu, Sichuan, China

Company facts

Year established	2004
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Chengdu (Sichuan)
Number of factories	1
Factory location(s)	Chengdu (Sichuan)
Total factory area	3,000sqm
No. of full-time employees	170
No. of R&D/design staff	8
No. of QC staff	10
Annual sales (all products)	\$8.0mn
Annual R&D spending	\$20,000
ISO certification	Pending

Sales & output: Display parts & components

Annual sales	\$7.5mn
Share of total sales	94%
Annual export sales	\$4.5mn
Total monthly capacity	400,000 units
Average monthly output	300,000 units
Capacity utilized	75%
Average monthly exports	180,000 units
Export ratio	60%
OEM % of exports	15%
ODM % of exports	10%
OBM % of exports	75%
Other products made	Rope lights, LED keychains, precision power supplies

Capability

Production checklist

Module design	Yes
Mold making	Yes
PCB making/design/ subassembly	No
SMT	Yes
Plastic injection	No
Wafer processing	No
Packaging	Yes
QC/QA testing	Yes

Exports by product

CRTs	—
LED components	—
LED displays & modules	100%
LCD backlights	—
LCD modules	—
Plasma display modules	—

Exports by market

North America	20%
European Union	20%
Europe (non-EU)	5%
Asia-Pacific	10%
Middle East	35%
Other	10%

Outlook

- **Export prices**
Decrease
- **Export price decrease**
Less than 5%
- **Export sales**
Increase more than 20%
- **Target market**
European Union
- **Capital expenditure**
No increase
- **Major challenge**
Price competition
- **Export capability**
Widen product range
- **R&D focus**
Better brightness

Popular export models



LED module

Model	BV-Power_WP-0.5W
Minimum order	100 units
Packaging type	Carton
Delivery time	15 days
Indicated price	•

Description: Red, yellow, white, green, blue; 30 lm luminous flux; 12VDC operating voltage, 0.96W power consumption; 120 to 140-degree viewing angle; -40 to 80 C operating temperature; 29x26x6mm, 20g



LED module

Model	BV-Flex-Power_SMD-15
Minimum order	100m
Packaging type	Anti-static bag
Delivery time	15 days
Indicated price	•

Description: 360 lm/m luminous flux; 12VDC operating voltage, 18W/m power consumption; 140-degree viewing angle; -25 to 60 C operating temperature; 1000x10x2mm, 36g



LED module

Model	BV-Strip_Piranha-1x3
Minimum order	500 units
Packaging type	Carton
Delivery time	15 days
Indicated price	•

Description: Red, yellow, amber, green, blue, warm/pure white; 13 lm luminous flux; 12VDC operating voltage, 0.24W power consumption; 110 to 120-degree viewing angle; -40 to 20 C operating temperature; 72x18x13mm, 18g

• Information not disclosed

PRODUCT GALLERY

LED components



Foshan NationStar
(profile page 42)
Model: 0603 SMD LED Lamp
Minimum order: 30,000 units
Packaging type: Carton
Delivery time: 7 days
Indicated price: •
Description: SMD LED; white; 3V forward voltage, 25mA forward current; 1.6x0.8x0.3mm; InGaN/GaN material



Foshan NationStar
(profile page 42)
Model: 1206 SMD
Minimum order: 30,000 units
Packaging type: Carton
Delivery time: 7 days
Indicated price: •
Description: SMD LED; blue; 3.2V forward voltage, 25mA forward current; 3.2x1.5x1.1mm; InGaN/GaN material



Foshan NationStar
(profile page 42)
Model: Top Tri-Color LED
Minimum order: 30,000 units
Packaging type: Carton
Delivery time: 7 days
Indicated price: •
Description: Red, green, blue; 3.2V forward voltage, 25mA forward current; 3.5x2.8x1.9mm; AlGaInP/GaAs, InGaN/GaN materials



Glorious
(profile page 44)
Model: GL-LT8-1.2
Minimum order: 50 units
Packaging type: Carton
Delivery time: 15 days
Indicated price: •
Description: 1350 lm brightness; 110 to 240V operating voltage, 16W power consumption; 180-degree viewing angle; 25.4x1200mm, 350g



Glorious
(profile page 44)
Model: GL-MR16-1x3.7W
Minimum order: 50 units
Packaging type: Carton
Delivery time: 15 days
Indicated price: •
Description: 1200cd/sqm brightness; 11 to 18VAC/DC operating voltage, 3.7W power consumption; 25-degree viewing angle; -20 to 50 C operating temperature; 25.4x1200mm, 350g



GMY
(profile page 46)
Model: Par16
Minimum order: 3,000 units
Packaging type: Colored box
Delivery time: 21 days
Indicated price: •
Description: Warm white, 20 LEDs; 5000 to 7000nm wavelength; 24 to 34 lm brightness; 110 or 220VAC operating voltage, 1W power consumption

• Information not disclosed