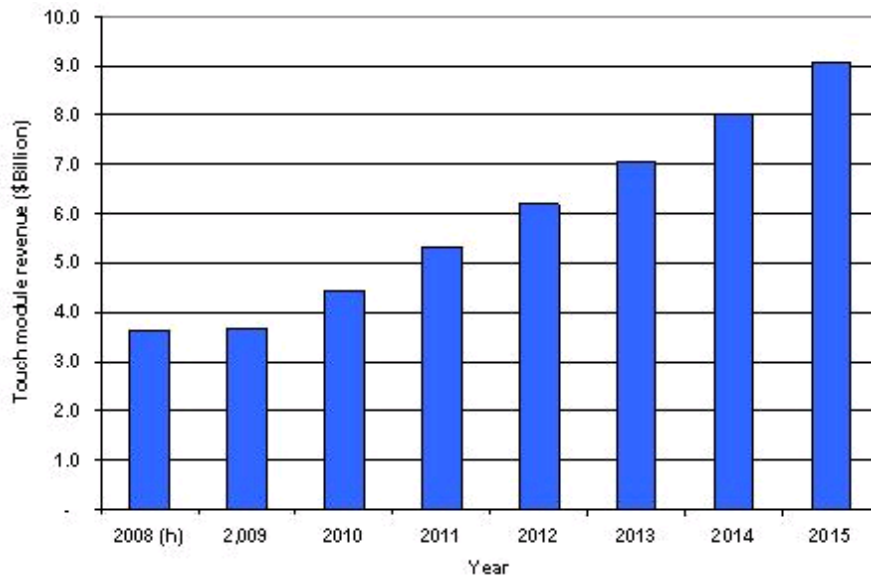


## ■ Touch Screen Module Revenues Forecast to Reach \$9B by 2015

AUSTIN, TEXAS, May 20, 2009—In its recently released *2009 Touch Panel Market Analysis Report*, DisplaySearch forecasts the total touch screen module market will grow to \$9 billion by 2015, from \$3.6 billion in 2008, with a CAGR of 14%.

Figure 1: Touch Screen Module Revenue Forecast



Source: DisplaySearch 2009 *Touch Panel Market Analysis*

“Touch screens are becoming widespread due to the ease of use and intuitive interfaces they enable, which can save time and increase productivity. Falling prices have also spurred adoption. Finally, touch screen devices are now perceived as cool and fun,” noted [Jennifer Colegrove](#), PhD, Director of Display Technologies at DisplaySearch. “Touch screen penetration has been rapidly increasing in mobile phones, portable navigation devices, gaming and other applications. Over the next several years, touch screens will undergo strong growth in large-size applications, such as retail, ticketing, point of information and education/training.”

DisplaySearch surveyed over 170 suppliers of touch screen modules, controller ICs, ITO films and other technologies to produce the 2009 *Touch Panel Market Analysis*. These firms are profiled in the report, and 2008 shipments and revenues for over 100 touch screen suppliers are included.

The touch screen industry is extremely diverse, with different companies pursuing several different technologies. There are over a dozen touch screen technologies. Resistive touch screen is the leader in terms of unit shipments and over 60 companies are manufacturing it. However, both surface and projected capacitive technologies have attracted numerous suppliers, and many companies are also pursuing multi-touch capabilities.

Table 1 indicates the number of touch screen suppliers by technology. Some companies supply only a single touch technology, while others supply several, such as Elo/Tyco Electronics and 3M. In addition, some companies only produce controller ICs, while others manufacture entire modules, including the touch sensor and controller IC.

Table 1: Touch Screen Suppliers by Technology

Technology	Number of Companies
Acoustic (SAW)	9
Acoustic (Bending wave)	3
Combo	4
Digitizer	6
In-cell	6
Infrared	13
Optical Imaging	10
Projected Capacitive	27
Resistive	64
Surface Capacitive	22
Z-Other Technology	6
Multi-touch	50
Tactile feedback	4
Controller IC only	16

Source: DisplaySearch 2009 [Touch Panel Market Analysis](#)

Additional key trends discussed in the report are the following:

- Projected capacitive shipments have increased substantially. Popularized by Apple's iPhone and iPod Touch since 2007, shipments of projected capacitive touch screens have increased substantially and become the second biggest touch technology following closely behind resistive touch. About 27 touch screen suppliers manufacture it. Not only have more resistive touch screen manufacturers moved to produce projected capacitive, but projected capacitive technology has evolved to single layer or film type, and can serve sizes larger than 100".
- Multi-touch is increasing its penetration rate. Before the iPhone, multi-touch implementation required large, heavy and expensive devices. Currently, about 50 suppliers are shipping multi-touch screens using different technologies. Microsoft's upcoming Windows 7 will support multi-touch, enhancing industry interest.
- Mobile phones are the biggest application of touch screens in terms of unit shipments. There were about 220 million touch screens shipped for mobile phone applications in 2008, which is a 16% penetration rate. DisplaySearch forecasts that the penetration rate of touch in mobile phone will reach nearly 40% by 2015.
- 2009 will be marked with even more new touch technologies reaching commercialization and increasing penetration, such as in-cell, force sensing and some combination-type touch panels.

DisplaySearch's 2009 [Touch Panel Market Analysis](#) is a comprehensive analysis of the touch panel technologies and their market forecasts through 2015. This report has detailed breakdowns of 20 applications with 10 touch technology categories and eight size categories. It also has details on touch controller IC, sensor market, area and multi-touch forecasts through 2015.

For more information on this report, please contact Charles Camaroto at 1.888.436.7673 or 1.516.625.2452 or [contact@displaysearch.com](mailto:contact@displaysearch.com) or contact your regional DisplaySearch office in China, Japan, Korea or Taiwan.

Don't forget to register for SID's Business Conference, co-hosted by DisplaySearch and SID, during the SID Display Week to hear Dr. Colegrove's presentation on "Emerging Display Technologies that will Lead the Future Display Industry." To view the full agenda for the SID Business Conference and presentation abstracts, visit [www.sid.org/conf/sid2009/business.html](http://www.sid.org/conf/sid2009/business.html). To register, visit [www.sid.org/conf/sid2009/registration.html](http://www.sid.org/conf/sid2009/registration.html).

Visit DisplaySearch at Booth #726 during SID's DisplayWeek, May 31-June 5 in San Antonio, Texas. Media interested in scheduling a briefing during the show or in need of market data for their SID articles should contact Stacey Voorhees-Harmon at [stacey@savvypublicrelations.net](mailto:stacey@savvypublicrelations.net) or call 925-336-9592.

#### About DisplaySearch

DisplaySearch, an NPD Group company, has a core team of 59 employees, located in Europe, North America and Asia, who produce a valued suite of FPD-related market forecasts, technology assessments, surveys, studies and analyses. Visit the [DisplaySearch blog](#) to read about how our top analysts are interpreting up-to-the-minute issues that impact the display industry, and join us in this discussion about technology and the flat panel industry. The company also organizes influential events worldwide. Headquartered in Austin, Texas, DisplaySearch has regional operations in Chicago, Houston, Kyoto, London, San Diego, San Jose, Seoul, Shenzhen, Taipei and Tokyo, and the company is on the web at <http://www.displaysearch.com/>.

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