

In June 2020, mobile phone panel shipments increased to 202 million, up by 6% MoM

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Key findings

- Smartphone panel shipments jumped to 153 million, up by 20% month-over-month (MoM) as smartphone OEMs started to increase the purchase volume for new models for the second half of 2020 (2H20).
- However, feature phone panel shipments decreased to 50 million, down by 5% MoM.

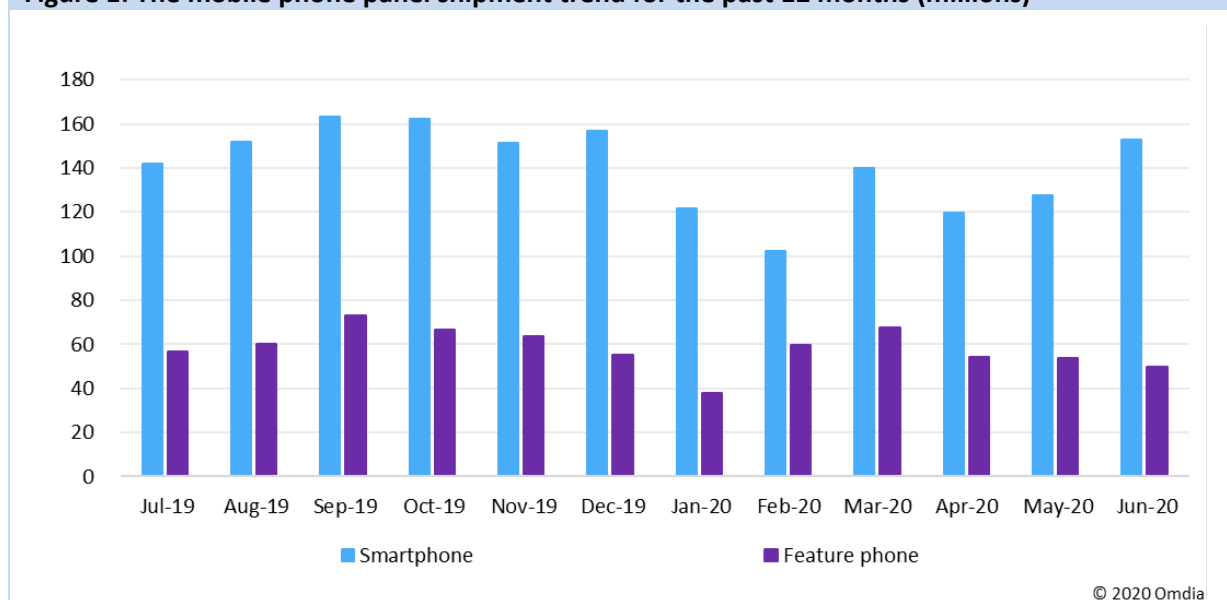
According to the latest *Omdia Smartphone Display Shipment and Price Tracker* (please refer to the link in the “Further reading” section of the Appendix for more details), the total mobile phone panel shipments of 13 major panel makers increased for three consecutive months to 202 million, up by 6% MoM. As shown in **Table 1**, smartphone panel shipments increased by 20% MoM to 153 million, but feature phone panel shipments declined to 50 million. Even though there is still a significant COVID-19 impact, the display market demand will likely recover gradually as the demand for new products from smartphone OEMs for the 2H20 sales is increasing.

Table 1: Mobile phone panel shipment summary in June 2020

	June 2019	May 2020	June 2020	MoM	YoY
Smartphone	138	128	153	20%	11%
Feature phone	53	54	50	-7%	-5%
Total	190	181	202	12%	6%

Source: Omdia

Figure 1: The mobile phone panel shipment trend for the past 12 months (millions)



Source: Omdia

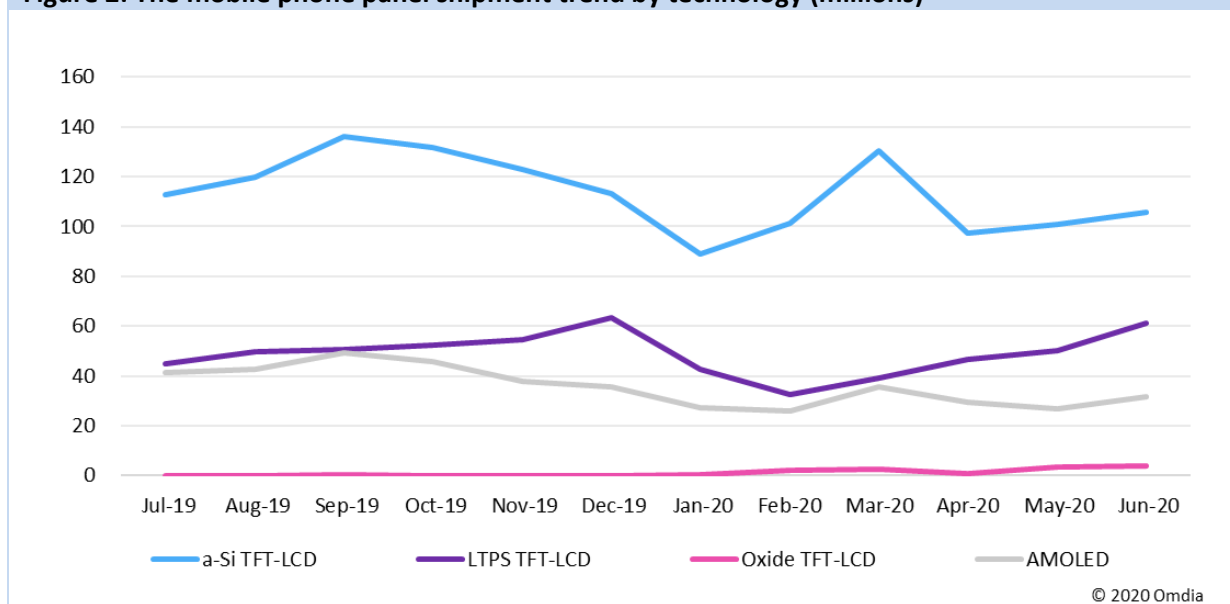
The a-Si TFT-LCD panel shipments by panel substrate technology increased by 5% MoM to 106 million, despite the slow demand for feature phones. However, its market share dropped by 3.5 percentage points to 52.2% of the total mobile phone panel shipments. Based on application, the a-

Si TFT-LCD panel shipments for smartphones increased by 18% MoM to 59 million, or 36.7% of the total smartphone panel shipments in June 2020.

LTPS TFT-LCD panel shipments surpassed 60 million in six months. The shipments expanded to 61 million, up by 22% MoM. Additionally, the market shares of the total mobile phone panel shipments and smartphone panel shipments were 30.2% and 40.1%, respectively. The demand from China's smartphone OEMs has increased rapidly.

AMOLED panel shipments also increased by 18% MoM to 32 million, or 15.7% and 20.8% of the total mobile phone panel shipments and smartphone panel shipments, respectively. The demand of rigid AMOLED has been recovering gradually from mainly Chinese smartphone OEMs. Further, since flexible AMOLED shipments to Apple iPhones began in July 2020, AMOLED shipments will continue to increase in the coming months.

Figure 2: The mobile phone panel shipment trend by technology (millions)



Source: Omdia

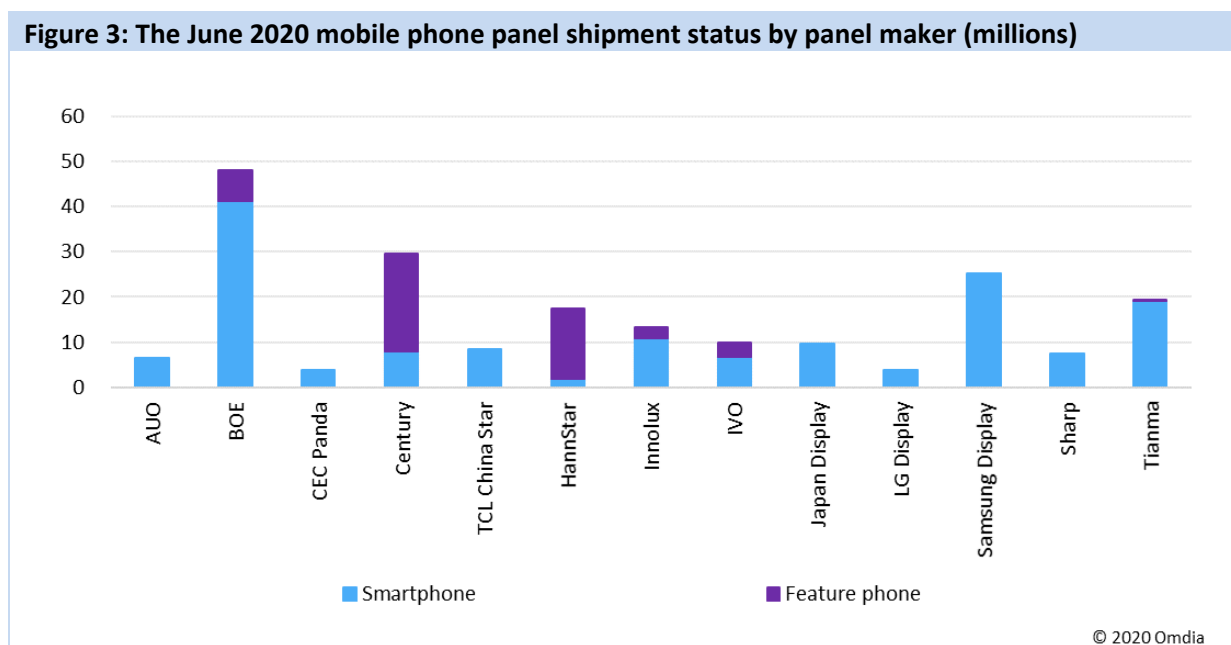
As shown in **Figure 3**, BOE, Century, Samsung Display, Tianma, and HannStar remained the top five based on the total mobile phone panel shipments. All the five panel makers, except HannStar, increased panel shipments in June 2020. These five panel makers' market shares contributed 69.1% of the total mobile phone panel shipments.

In terms of smartphone panel shipments, BOE, Samsung Display, Tianma, Innolux, and Japan Display were the top five panel suppliers like in May 2020. The shares of these five panel makers' panel shipments accounted for 69.6% of the total smartphone panel shipments. Meanwhile, HannStar, Century, and BOE remained the top three panel suppliers for feature phones, or 89.1% of the total feature phone panel shipments.

- BOE's panel shipments increased by 7% MoM to 48 million, or 23.8% of the total mobile phone panel shipments. The company's smartphone panel shipments increased by 68% MoM to 41 million, and it has stayed at the top spot based on the smartphone panel shipments for three months. However, its feature phone panel shipments decreased to 7 million, down by 34% MoM.

- Century’s panel shipments increased to 27 million for an increase of 17% MoM. The company’s smartphone panel shipments increased by 20% MoM to 8 million, and its feature phone shipments increased to 22 million, up by 15% MoM. Century ranked first based on the feature phone panel shipments.
- Samsung Display’s panel shipments increased to 25 million, up by 20% MoM. The demand for rigid AMOLED rebounded. Omdia expects its panel shipments to expand rapidly as the production for Apple’s iPhone 12 series begins from July 2020 onwards.
- HannStar’s panel shipments fell to 17 million for a decrease of 27% MoM. The company continued to reduce its smartphone shipment volume as a result of the currently poor pricing situation. Instead, HannStar increased its production volume for IT applications. Thus, the company’s smartphone shipments decreased to 2 million, down by 43% MoM. Its feature phone shipments also decreased to 16 million, down by 25% MoM.
- Tianma’s panel shipments continued to increase to 19 million, up by 8% MoM thanks to the strong LTPS TFT-LCD demand from Chinese smartphone OEMs.

Figure 3: The June 2020 mobile phone panel shipment status by panel maker (millions)



Source: Omdia

Appendix

Further reading

[Smartphone Display Intelligence Service](#)

[Smartphone Display Shipment & Price Tracker - June 2020](#) (July 2020)

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