IHS Markit

Automotive Touch & Interface Report – 2019

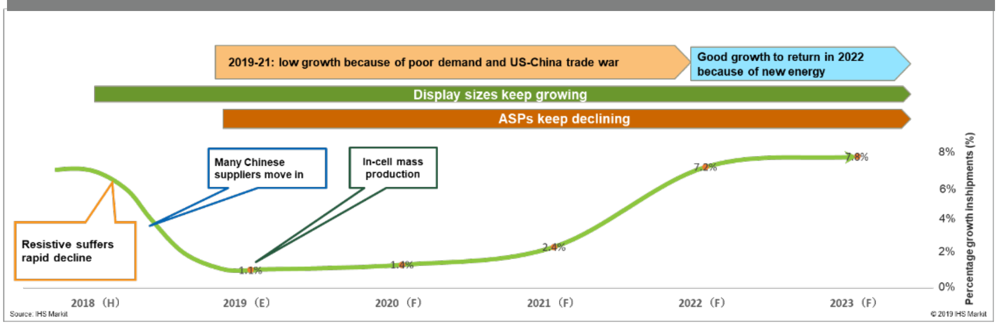
Executive summary

This annual report offers comprehensive analysis of the technologies, trends, prospects, and challenges in the touch module market for automotive displays. Already suffering from low growth amid weak demand in a maturing field, the global touch module market has been set back further by the ongoing US-China trade spat; Chinese makers have been hit especially hard. Growth will return in 2022 when the market recovers, reinvigorated by new technologies and as demand rises for larger-sized displays, stimulating the touch market in turn.

An important part of the report is the chapter on critical components in Chinese automotive touch offerings. In the discussion on sensor structures, the first component, two technologies are covered: resistive touch, once the dominant mechanism but now confined to trucks; and projected capacitive, the mainstream technology today, preferred for multi-point touch capabilities and fast response times. Projected capacitive divides further into two segments, based on the way touch sensors are incorporated: as add-on types, in the form of either glass-based or film-based solutions; and as embedded types, either as on-cell touch or in-cell touch. The two other components discussed in detail within the section are the cover lens and the adhesives. An in-depth report on the cover lens is also available. For more details, see the Touch Panel Cover Glass Report – 2019.

The report also provides a detailed picture of the touch module industry, with extensive forecasts—both historical and projected—furnished on a range of significant market elements, including anticipated module shipments and revenue volume until 2023; average selling prices in the face of continuing fierce competition; module sizes, including those being developed for use in electric cars; module components, covering all sensor structures for both projected capacitive and resistive technologies; and performance of the market over time in China, Japan, South Korea, and Taiwan, where the industry's major suppliers are located.

Automotive touch module market summary



Of notable interest in the report is the insightful chapter on the automotive touch supply chain in China. Seven key areas are examined, including the Chinese automotive ecosystem, especially as it relates to the development of energy-efficient electric cars; design trends in touch on the center stack display; the fierce competition at play among Chinese Tier 1 suppliers; the effect on the domestic market given the large number of Chinese touch-module manufacturers; and the web of relationships, plotted in a graph, among Chinese automotive OEMs with Tier 1 suppliers and touch-module makers alike.
In its final sections, the report explores four emerging trends animating the global automotive human-machine interface (HMI) arena, while also tackling the impact of CASE—German automaker Daimler AG's new strategy for automotive mobility—on touch technology.

Key findings of the report include the following:

- Future revenue growth in the touch module space will depend on two variables: on automotive display screens becoming larger in size; and the extent of market penetration that can be achieved by embedded on-cell or in-cell touch solutions, which command higher prices on the market than currently dominant embedded add-on solutions.
- Global automotive touch resources are transferring from Japan to China, making Chinese touch suppliers an integral component of the touch module ecosystem.

The Automotive Touch & Interface Report – 2019 from IHS Markit | Technology is offered in the Displays research service, under the two research categories of Small & Medium Displays and Touch & Interface. Kimi Lin, senior analyst for touch and interface, is the author of the report.

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