

### NanoMarkets OLED Lighting Market Planning and Advisory Service

This service provides the most thorough analysis of the OLED lighting industry currently available. Subscribers to this program receive a comprehensive package of market reports, research notes, forecasting and research inquiry hours. These are designed to provide an in-depth understanding of where OLED lighting will generate new business revenues in the next few years, the business case pushing OLED lighting forward and the materials and manufacturing developments behind this growth.

#### REPORTS

There are five reports included in NanoMarkets OLED Lighting Market Planning and Advisory Service:

**Report # 1: The Business Case for OLED Lighting:** In this report we provide a critical analysis of the business case for OLED lighting. We examine the likely future performance and price scenarios for OLED lighting, examining different scenarios, with discussions of what this will mean for OLED lighting market penetration. Areas such as trends in luminance, lifetimes, efficiency, cost efficiency, etc. all receive a thorough analysis. And we also look at how OLED lighting will fair in competition with HB-LEDs and fluorescent lighting including residential, commercial and industrial lighting, automotive/vehicular lighting, backlighting, etc. *The goal of this report is to present the technical and pricing requirements that OLED lighting must meet in order to succeed and to discuss how and when OLED lighting can meet these requirements.*

**Report # 2 Manufacturing Capacity Analysis:** The ability of the OLED lighting industry to reach its full potential will depend heavily on its ability to build sufficient capacity – and of the right kind – to meet demand. The exciting news is that today, important companies such as GE are building pilot plants, enabling the first high-volume OLED lighting products to market. However, many open questions remain. How and when will the first mass production plants for OLED lighting appear? Who will build them? Will they be R2R or follow a different paradigm? Will it be possible to mass produce OLED lighting so that it can become price competitive in some sense with CFL and other established lighting technologies? *The objective of this report is to analyze the implications of what we have seen so far from OLED manufacturing and then provide our forecast for how ramp up will occur as well as to provide our assessments for the impact on the OLED lighting business.*

**Report #3: OLED Lighting Materials Market Trends and Impact:** As the OLED lighting business evolves, we believe that both electrode and active OLED materials will have to develop to meet the specialist color, luminance, and pricing needs of lighting. We can already see intense efforts to develop white OLEDs for lighting applications as well as a strong interest in the ITO-less OLED light. In this report NanoMarkets provides an analysis of how developments within the materials space will impact the development of the OLED lighting market. *In addition to providing a discussion and analysis of the key materials trends, the goal of this report is to provide a guide to success in the OLED lighting space for companies involved in the supply of OLED materials, coatings and substrates.*

**Report #4 OLED Lighting Supplier Strategies:** There are now about 30 companies actively developing products for the OLED lighting space. These include the largest lighting firms (e.g., GE, Osram and Philips), specialist OLED firms (e.g., Novaled and UDC) and luminaire/fixture firms (e.g. WAC Lighting). New firms are joining this list all the time and each has its own product/market strategy. This report builds on NanoMarkets almost four years of experience covering the OLED lighting space during which time we have interviewed many of the key players and come to understand their goals and motivations from an insider's perspective. *Based on this knowledge and understanding this report presents NanoMarkets' opinions on the strategies of OLED lighting suppliers and our assessments on their likely success, challenges and potential for failures.*

**Report # 5 OLED Lighting Market Forecasts:** This report is also based on NanoMarkets' years of experience analyzing the OLED lighting business. It presents our forecasts of the OLED lighting market broken out in volume and value terms across the key application markets: residential lighting, industrial and commercial lighting, backlighting, vehicular/automotive lighting, etc. To produce these projects we take into consideration manufacturer plans, likely consumer acceptance, historical patterns for market evolution in the lighting market, regulatory changes and many other factors. We also discuss likely patterns for the substitution of conventional lighting by OLED lighting; a key factor in any forecast, since OLEDs represent a completely new form of lighting that won't replace existing light bulbs and tubes on a one-to-one basis. *The main objective of this report to provide clear numerical projections of the OLED lighting market over the next eight years. And in addition to our main forecasts, we also discuss how these might vary under various plausible scenarios.*

### RESEARCH NOTES

The NanoMarkets OLED Lighting Market Planning and Advisory Service also includes *monthly* Research Notes. These will provide our thoughts and opinions on major developments in the OLED lighting space, as well as updates on our opinions expressed in the main reports.

For example, if a major new player enters the market, we might use a Research Note to discuss the impact on future market shares, manufacturing approaches and types of products available. Or a Research Note might work out what the impact of a new materials or device architecture breakthrough would have on the future of OLED lighting. *Whenever new developments and trends appears we will provide our ideas and opinions on what this means for the OLED lighting business. We believe that the thoughts expressed by us in the Research Notes will be an effective tool for designing and refining strategies in the OLED lighting business.*

### INQUIRY HOURS

This Service also includes pre-negotiated hours of inquiry time. This provides subscribers to this service the opportunity to discuss their specific concerns with NanoMarkets. *This time can be used to discuss current or possible future market developments, examine in more depth some of the conclusions found in our reports, or to review existing market strategies. Inquiry hours enable subscribers to tailor our service to their specific needs. They also present subscribers with the chance to present their own ideas and concepts for feedback from NanoMarkets' analysts.*

### WHY NANOMARKETS?

NanoMarkets has been analyzing and commenting on the OLED lighting space since 2007. We have:

- Published numerous reports in the OLED lighting space providing insight on market evolution, product trends and corporate strategies. *We have been covering the OLED lighting market longer than any other industry analyst firm*
- Conducted well-attended and in-depth webinars on OLED lighting opportunities
- Presented on OLED lighting and related topics at major industry conferences

- Served as a key source of information on OLED lighting markets for the financial community and the business press

Although the focus of NanoMarkets' lighting practice is on OLED lighting, we have also worked on high-brightness LEDs and EL lighting and this work has helped shape our realistic views of the opportunities and challenges that face suppliers in the OLED lighting space. *And while NanoMarkets also covers a number of other areas, OLED lighting is a core component to our firm's overall business and one that we research with care and precision.*

In addition to our long standing experience in covering OLED lighting what makes NanoMarkets unique is that we are industry analysts, not advocates, we are not trade show or conference providers and nor are we an industry association. Our belief is that the analyst's job is to provide critical and realistic commentary on the market and the technologies and suppliers that comprise it grounded in the logic of the technology and the economic conditions in which it will succeed or fail. We are very well versed in matters related to markets, technology adoption, materials and manufacturing allowing us to provide a service that no other firm offers.

Please contact us to learn more about this service.

**NanoMarkets**

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