
Ross Young

Founder and CEO

DSCC

**Bio:**

Ross Young is the founder and CEO of DSCC. Previously, Young served as SVP of Displays, LEDs, Lighting and PV at IMS Research after the firm acquired his market research business Young Market Research (YMR). Prior to YMR, he was VP of New Market Creation at Samsung LCD.

From 1996 to 2008, Young started, ran and sold DisplaySearch, the leading source of market intelligence, events and consulting to the flat panel display supply chain. With less than \$500 in capital, he grew the company to over \$10M in revenues during his tenure. Young launched most of the market categories for the company, including FPD equipment, FPD materials, TFT LCD shipments and technology, notebook PCs, desktop monitors, TVs and sell-through. He also launched the US events business, which included broadcasting the company's HDTV Conference on HDNet. In addition, Young led DisplaySearch's global consulting business.

He also played a pivotal role in establishing data-gathering relationships throughout the display supply chain from equipment manufacturers, materials suppliers, panel suppliers, OEMs, brands, distributors and retailers including POS relationships with Best Buy, Sears, Circuit City and specialty retailers and distributors. Young sold DisplaySearch to The NPD Group in 2005. He helped to match DisplaySearch's sell-in business with NPD's sell-through and consumer data, providing new insights to customers. NPD presented Young with their prestigious John Byington Award for outstanding creativity and innovation.

Prior to DisplaySearch, Young served in senior marketing positions at OWL Displays, Brooks Automation, Fusion Semiconductor and GCA in the driver IC, flat panel automation, etch and strip and lithography markets. At GCA, Young was named to the VLSI Research Executive All Star team for his attempts to help save the company, which had received extensive support from SEMATECH.

Young has made multiple TV appearances as a display industry expert, including NBC's The Today Show. He has been an invited speaker at numerous conferences worldwide, often keynoting. He has also been quoted in most major business and video publications including Business Week, Forbes, Fortune, The New York Times, USA Today and the Wall Street Journal. He received a Presidential Citation Award from the Society for Information Display (SID) in 2012 for "sustained service in promoting the Market Focus Conference Series from concept to successful completion."

Young has a BA in Economics and a Minor in Japan Studies from the University of California at San Diego (UCSD) with a year at Australia's University of New South Wales. At the graduate level, he completed UCSD's Graduate School of International Relations and Pacific Studies program with an emphasis on International Management and Japanese. He also studied at the graduate level for nearly two years at Japan's Tohoku University on a Ministry of Education fellowship where he completed research on the relationships between Japanese semiconductor and semiconductor equipment materials suppliers. This led to the publication of his book Silicon Sumo: US-Japan Competition and Industrial Policy in the Semiconductor Equipment Industry published by the University of Texas.

He resides in Austin, Texas with his wife Melinda and has three sons. Prior to recent injuries, he completed 12 IRONMANs in four years, including the 2016 IRONMAN World Championship in Kona, Hawaii. He can be reached at ross.young@displaysupplychain.com.

Abstract:**Display Supply Chain Market and Technology Outlook**

This presentation will examine where the display industry is now in the crystal cycle and where it is headed. I will cover the health of the panel makers, the near term outlook and current challenges to

be overcome. It will also examine both large-area and small/medium equipment spending and supply/demand. It will also discuss the key issues that need to be resolved to return the display industry to a profitable one and roadmaps to improve performance and profitability. It will also discuss companies most likely to outperform.

Abstract:

Display Equipment's Key Issues and Investment Outlook

This presentation will examine DSCC's latest equipment spending forecast, identifying market size, market share and the technology roadmap for LCDs and OLEDs. When will the slowdown in equipment spending end? Which companies are most likely to outperform? These and other questions will be covered.

Youngwoo Kim

Analyst

SK Securities



Bio:

Abstract:

Premium TV Market Forecast and Technology Competition

- 1) OLED vs. QLED, Competition of Premium TV
 - 2) Step by Step strategy for QD OLED
 - 3) What will be LG's next plan?
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Yoshio Tamura

Co- Founder and President of Asian Operations
DSCC



Bio:

Yoshio Tamura is Co-Founder and President of Asian Operations at DSCC, based in Tokyo, Japan. He is a 26-year veteran of liquid crystal display (LCD) market research and consulting and is one of the foremost authorities on the LCD market and its supply chain. He started covering this market in 1990 at Techno Systems Research (TSR) where he launched their LCD market research business and grew it rapidly.

After 10 years at TSR, he joined DisplaySearch in 2000 as Senior Vice President and Founder of DisplaySearch Asia where he played a critical role in launching a large number of highly popular LCD-related reports. Mr. Tamura developed or co-developed the company's core reports on large-area LCD shipments and forecasts by application as well as reports on fab utilization, pricing, costs, cost models, margin models, glass substrates, color filters, backlights and driver ICs. Most of those reports are still in existence today.

After The NPD Group acquired DisplaySearch in 2005, Mr. Tamura acquired the title of SVP and Fellow to recognize the critical role he played in developing report methodologies. After IHS acquired DisplaySearch in 2014, he became a Senior Director and Advisor within the Display Technology Group and recently left IHS Markit to join DSCC where he is expected to co-develop a growing number of reports on OLEDs and other advanced display-related technologies.

Mr. Tamura is a graduate of Chuo University where he majored in international economics. He can be reached at tamura@displaysupplychain.com.

Abstract:

Smartphone & OLED Display Market Trend

- 1) Smartphone display demand by set brand by display technology (LCD, Rigid, Flexible)
 - 2) Rigid and Flexible OLED display supply chain between brand and panel suppliers
 - 3) Smartphone OLED display operating margin trend and the future forecast
 - 4) How much flexible/rigid OLED and LTPS LCD cost will be lowered toward the future?
 - 5) How big panel sizes will be larger?
 - 6) OLED display size and aspect ratio trend (16/18/18.5/18.7/19/19.5)
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Rita Li

Director of China Operations
DSCC

**Bio:**

Rita Li joined DSCC as Director of China Operations. She has over 10 years of experience working in in the flat panel industry.

Ms. Li joined Universal Scientific Industrial (USI) in 2007 as a Business Development Manager, covering all supply chain management internally and maintaining key client relationships with AUO, Innolux and others. Her product line was PCBA - a key component to panel suppliers.

In 2010, she joined NPD DisplaySearch in a sales and marketing role and worked at DisplaySearch for five years. She played a key role in developing the China business in terms of report sales, consulting and events. She also developed new business for the company in the solar/PV market. Ms. Li is deeply familiar with the China flat panel industry, from materials to

brands and OEMs.

After IHS acquired DisplaySearch in 2014, Ms. Li moved to a public display solutions company that brought metal mesh technologies to the China market in 2015. She quantified the market size and outlook for large-size touch pads for the company. In her free time, she enjoys traveling, music, reading, sports and spicy food. Rita is based in Shanghai, China and can be reached at rita.li@displaysupplychain.cn.

Abstract:**China AMOLED Supply Chain Analysis & Market Outlook**

- 1) 2018 – Is a cold year for China AMOLED makers?
 - 2) China Fab and Investment Activities
 - 3) China AMOLED Panel Makers Strategy and Value Chain
 - 4) China AMOLED Panel Makers Roadmap
 - 5) China Smartphone Brands AMOLED Penetration and Product RM
 - 6) ASP Trend in China Market
 - 7) China Supply and Demand in Surplus in Future?
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Calvin Lee
Director
DSCC Korea



Bio:

Calvin Lee joined DSCC as Director of Korean Operations. Calvin has more than 20 years experience in display market research and consulting.

He started display market research in 1996, the same year DisplaySearch was formed, while employed at Samsung SDI where he covered the entire display industry covering CRT, LCD and PDP markets and technologies. After 10 years at Samsung SDI, he joined DisplaySearch in 2006 as research director where he played a key role in gathering display market data in Korea.

He later joined DisplayBank as VP of Marketing, also covering the display market. After DisplayBank was acquired by IHS and merged with other display groups, he joined SNE Research where he covered IT, electric vehicle and battery markets. He graduated with a degree in electronics engineering from Hong-Ik University. He lives in Seoul with his wife and 2 daughters. He enjoys hiking and golf.

Abstract:

OLED Panel Makers' Competiveness Analysis and Future

Abstract:

Foldable Display Key Technology and Commercialization

- 1) What are the technology challenges?
 - 2) What kind of panel sizes will come out in 2019 and toward the future?
 - 3) How much the panel costs and the set prices?
 - 4) Who will launch from panel suppliers and set brands?
 - 5) How much will foldable display demand help flexible OLED surplus?
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