



e-Paper

A new generation of screens with new applications?

Market Report

The applications of e-paper cover a wide range of technologies and uses, some of which are already a reality. Through very precise analysis conducted worldwide, and based on an inventory of products and a large selection of case studies, this reports helps measure the stakes that e-paper represents for a number of sectors.

Key questions

- What are the key technologies used in e-Paper? Do they have preferred areas of application?
- Who are the key players in the e-Paper value chain, on both the technology provider and investor side of the equation?
- What are the areas of application spurring the development of e-Paper?
- What impact will the development of e-Paper have on the telecom sector?
- What is the outlook for e-paper in each industry sector?

> Description of more than 100 e-Paper projects



1. Technologies

1.1. Main types of technology

- Electrochromism or particle technology
- ChLCD
- Electrochromism
- Electro-wetting
- Backplanes
- Other technologies

1.2. Expected developments up to 2012

- Colour, video, flexibility, cost
- Roadmap for e-paper

1.3. Other display technologies

- E-paper vs. LCD, OLED

2. Key players

2.1. Key technology-side players

- e-paper technology chain
- R&D labs, frontplane, backplane
- Profiles of key players

2.2. Influential players: investors & major clients

- Weight of players from the imaging, chemical, defence, CE, logistics & distribution, stationery, post, print media & publishing sectors

3. e-paper markets and applications

3.1. Print media

- Global print media market
- Applications in the print media industry
- Case study: Les Echos
- Presentation of 25 projects

3.2. Publishing

- State of the publishing market
- Application in the publishing industry
- Case studies: Kindle (Amazon), Feedbooks
- Presentation of 15 projects

3.3. Consumer electronics

- e-book readers
 - e-book reader market, 2008-2012
 - Presentation of 15 readers
 - Case study: Sony Reader
- Watches
 - Analysis of watches and clocks (e-paper screen)
 - Outlook in the luxury watch market

• Peripherals and other accessories

- Presentation of 10 CE products
- Case study: Ambient Devices
- Devices with small screens

3.4. Retail

- e-paper labels in stores
- Electronic label markets
- Challenges for retail
- Leading e-paper label players
- Presentation of 10 retail projects
 - Case study: Tesco
- Logistics applications: RFID combinations
 - Case study: Deutsche Post

3.5. Advertising and display

- Outdoor advertising
 - Display advertising market
 - Development of electronic display
 - Case study: Clear Channel
 - Presentation of 10 outdoor display ad projects
- Point of sale advertising
 - Possibilities created by Ink-In-Motion solutions

3.6. Telecoms

- Mobile phone
 - Case study: Motofone F3 (Motorola)
 - Benchmark of 5 mobiles (e-paper screen)
 - Content-centric mobile services
 - Operator initiatives
 - Case Study: KDDI
- Other initiatives from telcos
- involvement of the telecom industry

3.7. Other markets

- Banking: OTP cards
- Medical: tablets
- Other: decorative objects

4. Outlook

4.1. Levers and impediments to the development of e-paper

- Levers: price of paper, sustainable development, technological developments, integrators, digital content
- Impediments: cost of the solutions, performance, substitutes

4.2. Forecasts

- e-paper market up to 2015
- Roadmap by sector of application

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Players & Projects profiled in this report

Technology-side players	
Aveso	Ntera
Bridgestone	Opalux
E Ink	Plastic Logic
Epson	Polymer Vision
Fujitsu	Prime View International
Fuji Xerox	Qualcomm
Kent Displays	Siemens
Liquavista	SiPix
Nemoptic	ZBD Display

Projects profiled	
Print media	De Tijd , Esquire, Handelsblad , The Mainichi , Le Monde, Newspapers, NRC Handelsblad, La Repubblica, Yantai Daily...
Publishing	Arinc, Gill & Macmillan, Feedbooks, Flamarion, Hachette, IGN, M21 Editions, Mobipocket, Numilog, Sweet & Maxwell...
e-book readers	Bookeen, eRead, Ganaxa, iRex Technologies, Jinke Electronics, Matsushita, Nemoptic, Neolux, Netronix, Plastic Logic, Polymer Vision, Ricavision, Sony...
Watches	Citizen Watch, Ntera, Phosphor, Seiko Watch
Peripherals	Ambient Device, A-DATA, Lexar, Minoura, Intel, Skullcandy, Smartdisk...
Retail	Kesko Foods, John Lewis, Mitsukoshi, Pricer, Sharp, Tesco, Tradeka, Wanzl ...
Outdoor advertising	Clear Channel Outdoor, Havas Euromedia, JC Decaux, Lamar Outdoor Advertising Astrec, Hamburg Hochbahn, JR East, The Mainichi Newspapers, Yomiuri Shimibun, Kanagawa Chuo Kotsu,...
Telecoms	KDDI, NTT DoCoMo, Orange, SFR, Sprint, Telecom Italia, Vodafone... Casio, NTT Docomo, Hisense, Hitachi, SoftBank, Silitech, ...

Case studies	
Amazon	KDDI
Ambient Devices	Les Echos
Clear Channel	Motorola
Deutsche Post	Tesco
Feedbooks	Sony

