



## DisplaySearch Topical: 120 Hz TV Value Chain Analysis and Forecast

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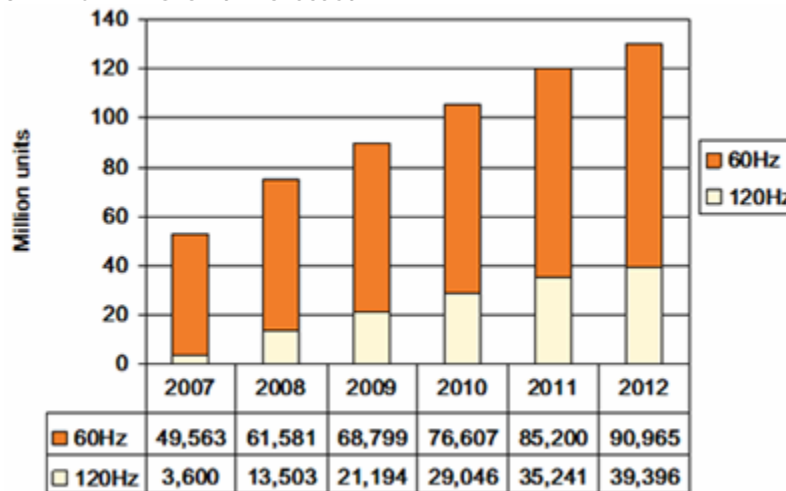
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## The Worldwide Market for 100/120 Hz TVs to Grow from 3.6 Million in 2007 to an Estimated 39.3 Million in 2012

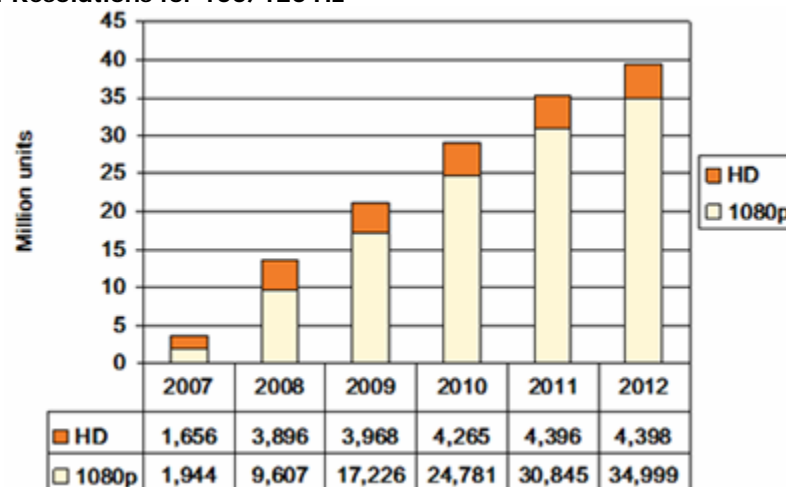
Austin, Texas May 15, 2008—The worldwide market for 100/120 Hz TVs is projected to grow from 3.6 million units in 2007 to an estimated 39.3 million units in 2012. This projection is among the findings in *120 Hz TV Value Chain Analysis and Forecast*, a new report available from DisplaySearch, the leading provider of market intelligence on displays and related technology. This growth will be concentrated in screen sizes of 37" and above with 1080p resolution in all regions, with an additional demand for 32"HD 100 Hz sets in Western Europe. Japan will have the highest penetration with a forecasted 81% in 2012, compared to Western Europe's 48% and North America's 35%. Western Europe is the dominant region overall in unit sales and is expected to lead demand throughout the forecast period, growing from 1.5M units in 2007 to 11.9M in 2012, while North America has a slower rate of introduction, but will overtake Japan in 2009. North American demand will be skewed to larger sizes (46"+).

Figure 1: 32" + 100/120 Hz LCD TV Growth Forecast



"100/120 Hz is a feature strongly reliant on good consumer education and product demonstration. This education of consumers is a critical factor for success," said Paul Gray, Director of TV Analysis at DisplaySearch. He added, "The effect of investment in consumer education and good demonstrations has led the growth of the category in Japan and Europe. Demand in North America has been more limited, but we expect that it will expand as more set-makers launch products this year and broaden the message. European growth has been helped by 100 Hz processing being a recognized concept for good picture performance from CRT TV days."

Figure 2: Breakdown of Resolutions for 100/120 Hz



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Other key findings from the report include

- The North American market remains slow to adopt 120 Hz in part due to a lack of consumer education and point-of sale demonstration.
- Most of the market will be Full HD 120 Hz, but a significant niche exists for European 32" HD units, as seen in Figure 2.
- 100/120 Hz accounts for over 65% of new models in Japan and almost half in the over 30" size category in Europe.
- The report also examines the system costs, product positioning and plans of panel makers and TV video processor IC vendors.

The DisplaySearch *120 Hz TV Value Chain Analysis and Forecast Report* will be available mid-May. Please contact Patrick Maki at [patrick\\_maki@displaysearch.com](mailto:patrick_maki@displaysearch.com) or +1.512.687.1511 or your local DisplaySearch representative for details and pricing.

Visit DisplaySearch's booth #634 during SID DisplayWeek 2008 to be held May 19-23 in Los Angeles, California.

Media interested in meeting with DisplaySearch's expert team of market analysts or in need of market research data for articles during SID's DisplayWeek, should contact Stacey Voorhees via email

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