

Sample Report: Asian LCD TV Panel Maker Alliances & Joint Ventures Analysis



AN NPD GROUP COMPANY

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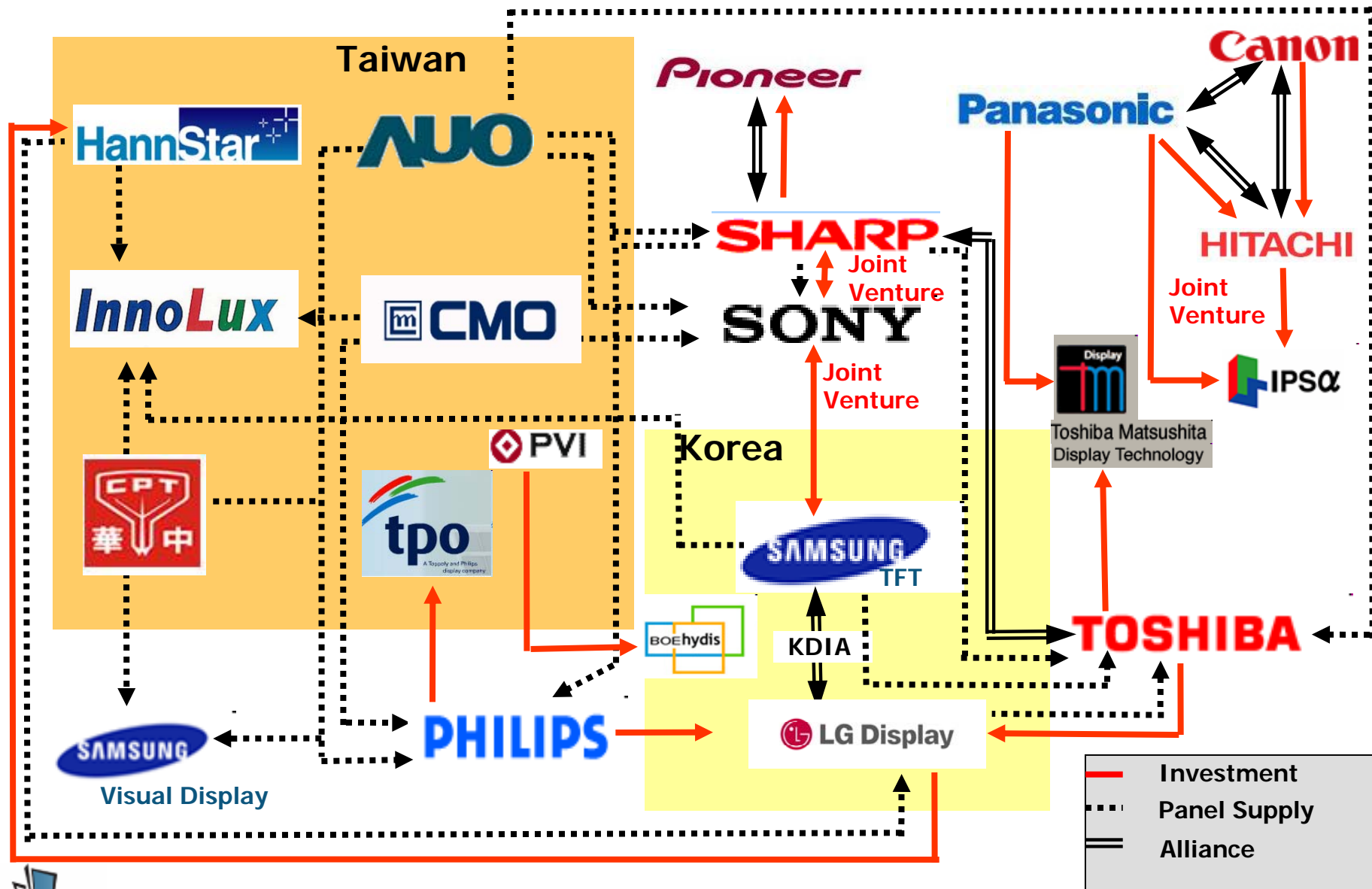
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Asian TFT LCD Maker Relationship Chart



Shipments of Top 10 LCD TV Brands 2001-2007 on a Unit Basis (000s)

- For the past 7 years, LCD TV shipments have grown from less than 1 million to 79 million units. Samsung became the only company to ship over 10 million in 2007.
- Samsung, LGE, Sony, Vizio and Polaroid grew their shipments over 100% in 2006 and 2007.
- Among the top five brands, Sharp has the lowest Y/Y growth rate and this might alter the company's LCD TV panel allocation policy to allocate more to external customers as growth of their panel capacity is larger than growth of their TV set shipments.
- The original white box brands like Vizio and Polaroid are growing quickly on account of North America market, but they also face some difficulties outside the US.

('000 units)	2001	2002	2003	2004	2005	2006	2007	2005->2006	2006->2007
SAMSUNG	4	235	336	820	2,222	6,204	13,383	179%	116%
SONY	9	111	363	981	2,367	5,370	9,562	127%	78%
PHILIPS	4	27	135	1,089	2,901	6,028	8,547	108%	42%
SHARP	495	696	708	2,186	3,536	5,253	8,048	49%	53%
LGE	43	133	192	648	1,431	3,300	6,820	131%	107%
TOSHIBA		5	94	355	1,111	2,197	4,279	147%	95%
PANASONIC	49	121	210	647	1,112	2,142	2,957	83%	38%
VIZIO					76	606	2,654	693%	338%
FUNAI				35	365	1,845	2,224	406%	21%
POLAROID					175	955	2,042	445%	114%
Others	16	26	564	2,006	6,031	12,091	18,818	100%	56%
Total	619	1,354	2,602	8,766	21,168	45,990	79,333	117%	73%

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