

European TV Market Forecasted to Grow 28% by 2012, According to DisplaySearch

AUSTIN, TEXAS, June 12, 2008—The latest market research findings from DisplaySearch, the worldwide leader in market research for the display industry, indicate that the total TV market will grow 24% between 2007 and 2012, with shipments rising from 42.9 million to 53.1 million units. In particular, this increase is driven by the Eastern European market, which is forecast to expand 31% to 15.4 million in 2012. These results were among key findings in DisplaySearch's *Quarterly Global TV Shipment and Forecast Report*.

"Eastern Europe, including Russia and Turkey, is the fastest-growing television market in the world today," said Paul Gray, DisplaySearch's Director of European TV Research. "Our analysis shows that the rate of uptake of flat panel TVs is as fast in Eastern Europe as it was in Western Europe and Japan in 2005 and 2006. As a result, we are seeing a rapid transition to LCD and Plasma technologies and the market has accelerated the adoption of larger sizes especially 32", as they have reached mass-market price points. CRT television shipments are consequently falling fast and are forecast to effectively vanish after 2011. It has been a dramatic shift: In Q3'07, shipments were about even between flat technologies and CRT, but by the end of this year over 75% of the market will be LCD or Plasma." Average sizes in Eastern Europe are expected to be a little smaller, with 42" at 32" in 2010 compared to 35" in Western Europe, reflecting lower spending power.

Samsung captured the leading shipment market share across Europe for all TVs with 31.0% share, followed by LGE (13.4%) and Philips ranked third at 12.7% in Q1'08.

Table 1: Top Five Brands in Europe with Shipment Share by Technology in Q1'08

Rank	Maker	LCD	PDP	CRT
1	Samsung	30.0%	27.5%	37.6%
2	Philips	15.7%	8.1%	1.3%
3	Sony	13.8%	-	-
4	LGE	12.5%	15.2%	16.2%
5	Panasonic	4.4%	39.7%	1.2%

DisplaySearch's findings also show that

- CRT TV now accounts for only 5% of the shipments in Western Europe, and is expected to disappear entirely from Western European markets in 2010.
- 1080p share will grow from 13% of shipments in Q1'08 to 32% in Q1'10 for Western Europe; in Eastern Europe, it accelerates from 5% Q1'08 to 19% in Q1'10.
- The European Cup and Olympics are expected to have little overall effect on the market, except for increased demand earlier in 2008.
- For 100 Hz, Western Europe is expected to grow from 1.5 million units shipped in 2007 to 11.9 million in 2012.

The report also includes a forecast of OLED TV, which is expected to ship 1.01 million units in Europe in 2012.

Figure 1: DisplaySearch's Western Europe TV Forecast

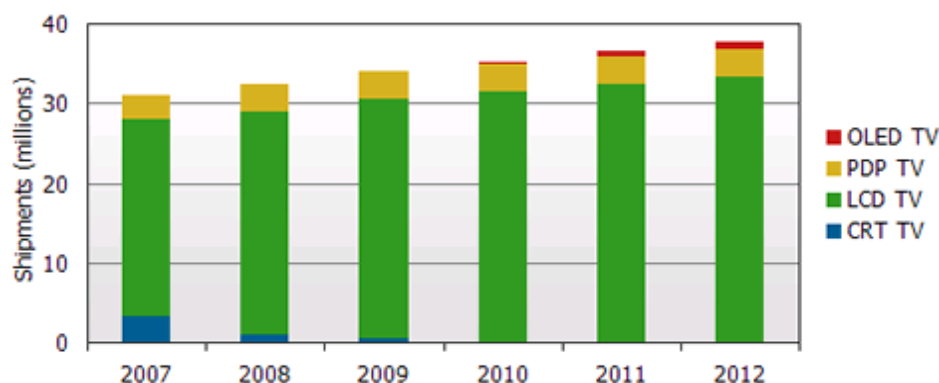
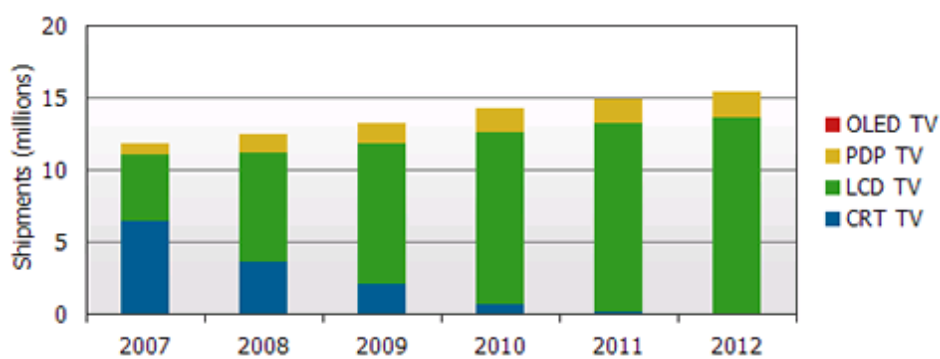


Figure 2: DisplaySearch's Eastern Europe TV Forecast



DisplaySearch's TV market intelligence including panel and TV shipments, TV shipments by region by brand by size for nearly 60 brands, rolling 16-quarter forecasts, TV cost/price forecasts and design wins can be found in its *Quarterly Global TV Shipment and Forecast Report*. For more information on this report, please contact Shawn Feddeler at shawn_feddeler@displaysearch.com or telephone +44 7919 493149 or your local DisplaySearch representative for details and pricing.

About DisplaySearch

DisplaySearch, an NPD Group company, has a core team of 59 employees located in Europe, North America and Asia who produce a valued suite of FPD-related market forecasts, technology assessments, surveys, studies and analyses. The company also organizes influential events worldwide. Headquartered in Austin, Texas, DisplaySearch has regional operations in Chicago, Houston, Kyoto, London, San Diego, San Jose, Seoul, Shenzhen, Taipei and Tokyo, and the company is on the web at <http://www.displaysearch.com/>.

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