

■ World-wide TV IC Market Expected to be \$1.33 Billion in 2008

Austin, Texas June 30, 2008—The worldwide market for flat panel TV ICs is expected to be \$1.33 billion in 2008, and is forecast to grow to \$1.35 billion in 2011. This is one of the findings in DisplaySearch's latest [Quarterly TV Electronics Report](#).

The share of MPEG-integrated video processors is expected to surge from 22% to 37% of flat panel TV ICs this year, due to design wins from Mediatek and Zoran reaching production in Samsung and Taiwanese ODMs. See Figure 1 for a forecast of shipments of TV decoding capabilities by compression type.

The forecast also represents an upward revision of 12% of TV IC revenues in 2011. Previous forecasts had anticipated a decline; however, new features are gaining acceptance and increased penetration of digital reception means that revenues are expected to remain broadly flat.

"The industry has managed to find new ways to add value, through MPEG-4 decoding and 100 or 120 Hz refresh rates," said [Paul Gray](#), Director of European TV Research at DisplaySearch. "Broadcasters moving to MPEG-4 are triggering a fresh round of innovation in TV set-making. The potential for refreshing the role of the TV is significant. The decode capability makes networked TV a mainstream opportunity. However, a continuation of recent hyper-competition would see the market pushed back into declining revenues in spite of its shipment growth." He added, "Set-makers are keen to revitalize televisions and keep them at the center of the home. Chipmakers are rising to this challenge, but a round of consolidation will be inevitable, if only because the development costs for these sophisticated devices can only be recouped over large shipments."

The report includes an analysis of the different applications of MPEG-4 and H.264 decoding by region. 120 Hz frame rate conversion systems are covered in the report and also analyzed in greater detail including LCD panels and TV sets in the [120 Hz Value Chain and Forecast Report](#).

Figure 1: 2007 to 2012 Forecast of TV Digital Decoding Capabilities by Compression Type

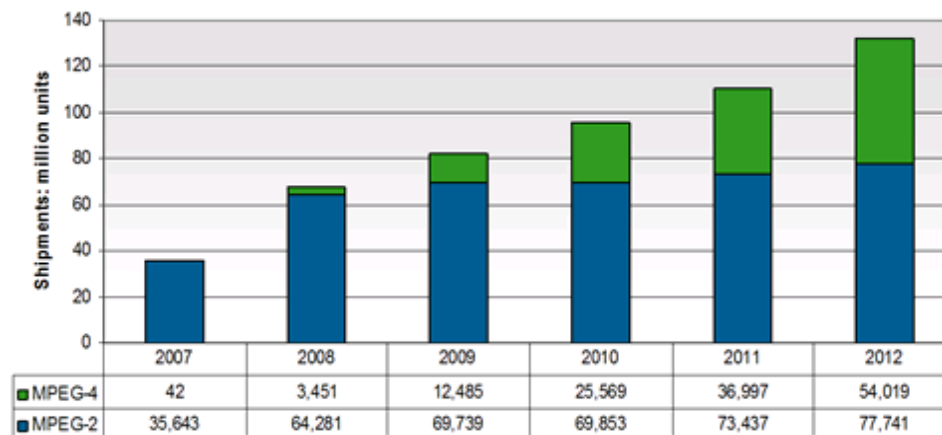


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The latest DisplaySearch [Quarterly TV Electronics Report](#) will be available mid-July. Contact sales@displaysearch.com, or your regional DisplaySearch offices in Japan, Korea, Taiwan and China for details and pricing.

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