

## ■ February Large-Area TFT LCD Shipments Grew to 29.5 Million Units and Revenues to \$2.96 Billion; Samsung Led Market in Units and Revenues and HannStar in Mini-Note Panel Shipments

AUSTIN, TEXAS, March 19, 2009—February 2009 shipments of large-area TFT LCD panels reached 29.5 million units, showing strong M/M growth of 23%, according to the DisplaySearch [Monthly TFT LCD Shipment Database](#). Specifically, large-area TFT LCD revenues reached \$2.96 billion, up 14% M/M. For both unit shipments and revenues February was the first positive monthly growth since September 2008. February's results were mainly due to increasing rush orders, as well as inventory refill from clients, but they could also be an indication that the TFT LCD industry is at, or near, the bottom of the cycle.

DisplaySearch's research found that LCD monitor panels had the highest M/M growth at 37%, followed by notebook PC at 21% and TV at 11%. However, shipments are still lower than in February last year, and the Y/Y decline is in the double digits. Table 1 shows monthly shipments by application.

Table 1: Monthly Large-Area TFT LCD Panel Shipments by Application (Millions)

	Feb 08	Jan 09	Feb 09	M/M Growth	Y/Y Growth
Notebook PC	10.3	7.1	8.6	21%	-17%
Monitor	16.1	9.1	12.4	37%	-23%
TV	8.1	6.9	7.7	11%	-6%
Other	1.0	0.8	0.8	-	-20%
L/A Total	35.5	24.7	29.5	23%	-17%

Source: DisplaySearch March 2009 [Monthly TFT LCD Shipment Database](#)

In terms of revenues, Samsung was the leader in large-area TFT LCD, with 30.2% market share, followed by LG Display at 26.8%. On a shipment basis, Samsung also led with 26.7% market share, followed closely by LG Display at 26.4%. Both shares are the highest level for the leading suppliers in four years.

In the notebook segment, LG Display led with 32.2% unit share, followed by Samsung at 29.9% and AUO at 15.9%. Samsung led in the monitor application with 27% unit share, followed by LG Display at 23.2% and CMO at 16.4%. LG Display also led in the TV application with 26.8% unit share, followed by Samsung at 25.2% and CMO at 17.9%.

In addition to large-area TFT LCDs, the DisplaySearch [Monthly TFT LCD Shipment Database](#) tracks 5.0" to 10.2" mini-note panel shipments. Mini-note PC panel shipments were 1.5 million in February 2009, a 69% M/M increase from 900,000 in January. HannStar was the leader in mini-note panel shipments in February.

DisplaySearch now reports shipment data by size and by suppliers on a monthly basis in the Premium Version of the [Monthly TFT LCD Shipment Database](#), so it is possible to track area shipment by supplier. In terms of area share, the top five panel suppliers in February 2009 were Samsung with 28.8%, LG Display with 27.2%, CMO with 14.5%, AUO with 13.4% and Sharp with 6.4%. Meanwhile, 16:9 aspect ratio notebook and LCD monitor panels accounted for 18% and 26%, respectively, of the total notebook and monitor panels shipped in February 2009.

According to [David Hsieh](#), Vice President of DisplaySearch, "The February results are encouraging for panel makers as they reflect a rebound in demand. All TFT LCD manufacturers have suffered from declining shipments every month for the past half-year. We believe rush orders and inventory refill from downstream contributed to the surge in panel shipments."

Mr. Hsieh added, "We previously noted that January 2009 could be the bottom of this cycle, and we believe March will show double-digit growth over February, as all panel makers are increasing capacity utilization. The key challenge for panel makers is to evaluate the supply-demand balance, which will be determined by the amount of production increase and by whether the growth in demand is sustained in Q2'09."

For information on the DisplaySearch [Monthly TFT LCD Shipment Database](#), contact Carl Holec at +1.512.687.1505 or [info@displaysearch.com](mailto:info@displaysearch.com) or contact your regional DisplaySearch office in China, Europe, Japan, Korea or Taiwan.

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