

■ May Large Area TFT LCD Shipments Indicate Samsung Led in Area with 27.5% , While LG Display Ranked #1 in Units with 25.2% and AUO Took Lead in Mini-Note PC Panel Segment

AUSTIN, TEXAS, June 24, 2009—May 2009 shipments of [large-area TFT LCD](#) panels 43.3 million units, up 8%M/M and 6%Y/Y, according to the most recent [DisplaySearch Monthly TFT LCD Shipment Database](#). The 43.3 million units also represent the highest on record for the past 12 months.

On a unit basis, LG Display was the leader with 25.2% market share, followed by Samsung with 24.6%, and AUO with 17.9%. Large area TFT LCD revenues reached \$4.7 billion, showing 15% M/M growth, but 35% lower than May 2008, an indication of how far prices declined in Q4'08 and Q1'09.

In terms of shipment volume, May's shipment results indicate a continuation of the large-area TFT LCD industry's recovery. DisplaySearch forecasts that shipments will increase again in June, and that the panel supply situation will continue to tighten in June and July, which will result in higher revenues.

All three major applications—notebook PC, monitor and TV—showed M/M growth. DisplaySearch's research found that LCD TV panels had the highest M/M growth at 14%, followed by notebook panels at 7%, and monitor panels at 5% (Table 1). The Premium Version of the [Monthly TFT LCD Shipment Database](#) includes shipment data by suppliers for each application and screen size.

Table 1: Monthly Large-Area TFT LCD Panel Shipments and Growth (Millions)

	May 08	Apr 09	May 09	M/M	Y/Y
Notebook PC	13.2	12.7	13.6	7%	3%
Monitor	18.8	15.8	16.6	5%	-11%
TV	8.6	10.7	12.2	14%	43%
Other	1.0	0.9	0.9	0%	4%
L/A Total	41.6	40.1	43.4	8%	4%

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

Large-area TFT LCD shipments reached 6.6 million square meters in May, up 10% M/M and 12% Y/Y, and the highest level in more than a year. The growth in shipment area was mainly driven by TV panels. Samsung led in area shipments with a 27.5% market share, followed by LG Display at 25.6%, CMO at 16.0%, and AUO with 15.9%.

In addition to large-area TFT LCDs, the [Monthly TFT LCD Shipment Database](#) also tracks 5.0" to 11.6" mini-note PC (netbook) panel shipments. Mini-note panel shipments were 3.1 million in May, almost flat from April. AUO led in shipments, passing HannStar, which had been the leader in mini-note panel shipments since January. Several panel makers have entered the mini-note market since May, including Innolux in Taiwan and InfoVision in China. At the same time, panel makers such as CMO, AUO, LG Display and Samsung have started to ship 11.6" panels for mini-note PCs.

According to [David Hsieh](#), Vice President of DisplaySearch, "May results are encouraging for panel makers, as they reflect a healthy recovery in demand." Hsieh added, "Considering the current end-market demand and the limited supply of glass substrates, as well as the low panel inventories, we expect that shortage conditions will continue. In June, both panel shipments and prices continue to increase, and we expect to see additional price increases in July."

DisplaySearch's Premium Version of the [Monthly TFT LCD Shipment Database](#) includes shipment data by suppliers for each application and screen size.

For information on the DisplaySearch [Monthly TFT LCD Shipment Database](#), contact Charles Camaroto at 1.888.436.7673 or 1.516.625.2452, e-mail contact@displaysearch.com or contact your regional DisplaySearch office in China, Japan, Korea or Taiwan.

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Wednesday, September 2, 2009

- [Emerging Display Technologies Conference: Innovation for the Next Wave of Growth](#), Thursday, September 3, 2009

For more information about these conferences and sponsorship opportunities, please contact Laura Castellano at 1.408.226.1101 or laura_castellano@displaysearch.com. Media interested in attending the conferences should contact Stacey Voorhees-Harmon at 1.925.336.9592 or stacey@savvypublicrelations.net.

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