

■ Large-Area TFT LCD Shipments Continued to Increase in July, Reaching 49.2 Million, Even as Prices Continue to Rise, DisplaySearch Reports

AUSTIN, TEXAS, August 27, 2009—July 2009 shipments of [large-area TFT LCD](#) panels reached 49.2 million units, up 5% M/M and 39% Y/Y, according to the most recent DisplaySearch [Monthly TFT LCD Shipment Database](#). This sets a new record for monthly large-area TFT LCD shipments.

According to [David Hsieh](#), Vice President of DisplaySearch, “July was a record-breaking month for large-area TFT LCD panels in several segments, including total shipments, shipment area, notebook PC, LCD TV and mini-note panel shipments. This indicates strong recovery in end-market demand and increased utilization at panel makers.”

Hsieh added, “Panel prices continued to rise in July, and revenues will increase again in August as shipments continue to grow. Despite the price increases, OEMs and brands are building inventories for the coming holiday season. DisplaySearch believes it is very important to watch inventories carefully in September, especially for LCD monitor and LCD TV panels.”

Additional highlights from DisplaySearch's [Monthly TFT LCD Shipment Database](#).

- Large-area TFT LCD revenues reached \$5.9 billion, up 11% M/M and 6% Y/Y, marking the first time in the past 12 months that there has been positive Y/Y growth.
- On a unit basis, LG Display was the leader with 24.7% market share, followed by Samsung with 23.4% and AUO with 16.8%. Samsung led in area shipments with 26.8% market share, followed by LG Display at 25.1%, CMO at 15.7%, and AUO with 15.6%.
- LCD shipments for notebook PC and for TV showed M/M growth—reaching monthly record highs of 16.7 and 13.5 million units, respectively. Slower demand for 20”+ monitor panels resulted in a 1% M/M decline in July. LCD TV panels had the highest Y/Y growth at 69%, followed by notebook panels at 36%, and monitor panels at 26% (Table 1).
- In terms of area, large-area TFT LCD shipments reached 7.4 million square meters in July, up 4% M/M and 45% Y/Y, the largest amount yet. The growth in shipment area was mainly driven by TV panels.
- Mini-note/netbook (5.0-11.6”) panel shipments were 4.3 million in July, also achieving an all-time high. HannStar led this segment with 1.2 million mini-note panels shipped in July.
- DisplaySearch forecasts that shipments will increase again in August, but at a slower rate because the glass substrate shortage is limiting panel makers' production. The panel supply situation will continue to tighten in August and September—resulting in higher revenues.

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

| | July 08 | June 09 | July 09 | M/M | Y/Y |
|-------------|---------|---------|---------|-----|-----|
| Notebook PC | 12.3 | 14.7 | 16.7 | 14% | 36% |
| Monitor | 14.2 | 18.0 | 17.9 | -1% | 26% |
| TV | 8.0 | 13.1 | 13.5 | 3% | 69% |
| Other | 0.9 | 0.9 | 1.0 | 11% | 11% |
| L/A Total | 35.4 | 46.7 | 49.2 | 5% | 39% |

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

The 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](#) and the premium version, which includes shipment data by suppliers for each application and screen size, 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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Contact

To contact DisplaySearch, call 1.888.436.7673 or 1.516.625.2452 or email

contact@displaysearch.com

Media contact Stacey Voorhees, 1.925.336.9592 or email media@displaysearch.com

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