

LCD TVs to Exceed 180 Million Units in 2010

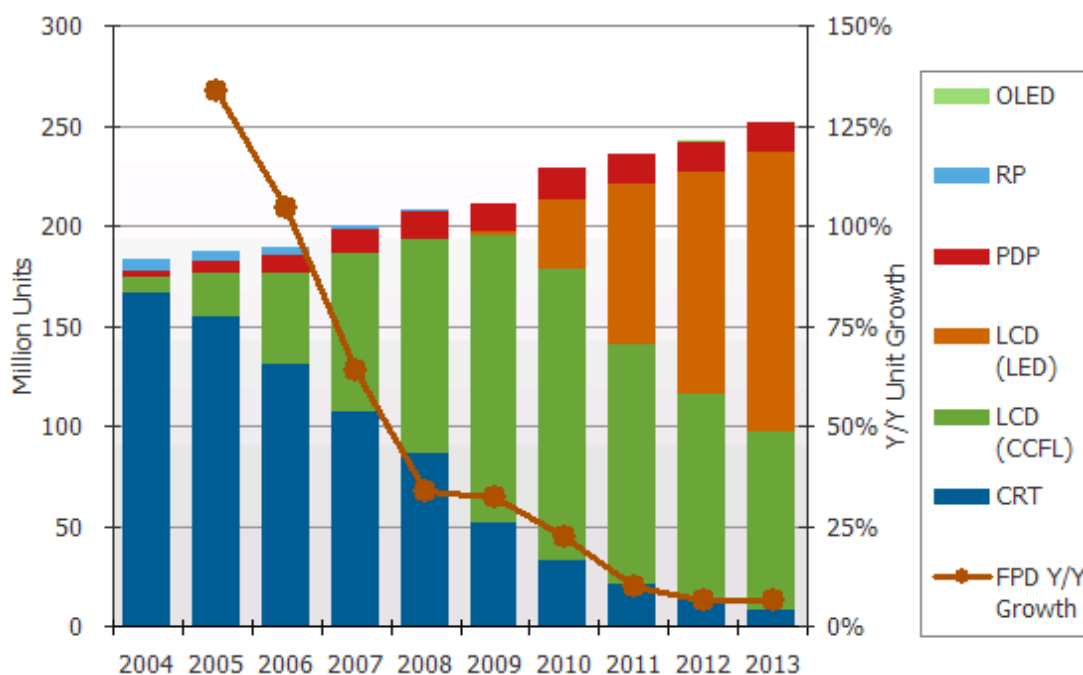
AUSTIN, TEXAS, March 23, 2010—2009 was a robust year for the overall flat panel TV market, with total units rising worldwide by more than 32%, very similar to 2008 growth rates. In markets such as Japan and China, growth in 2009 was better than in 2008, despite the recession. Given the strong result in 2009 and the positive influence of new technology introductions such as 3D and LED, DisplaySearch has increased its worldwide TV market forecast for 2010 by more than 10 million units to 228 million units.

“The rapid transition to flat panel technologies in emerging markets and the robust level of growth even in mature markets has led us to improve our outlook for 2010,” observed [Hisakazu Torii](#), Vice President of TV Market Research for DisplaySearch. “This is especially true for LCD TVs, which are now projected to exceed 180 million units in 2010, a 24% increase over 2009. This is helped by the introduction of new technologies like 3D, as well as the expansion of newer features like LED backlights and internet connectivity.”

Price erosion was the major factor contributing to the excellent growth in 2009, with LCD TV average prices falling 24% from 2008, much more than any preceding year. In 2010, volume-weighted average prices are only projected to fall by 5% for LCD TVs and 10% for plasma TVs. The reasons for the more modest decline are renewed growth in larger screen sizes, the fact that prices fell so far in 2009, and the increased share of more expensive LED-backlit LCD TV models, which carry a notable premium.

Plasma TV unit shipments are expected to rise about 6% in 2010 to just over 15 million units, after a 2% decline in 2009, aided by more robust 40"+ growth and the introduction of 3D plasma TVs from a number of different manufacturers. CRT TV shipments will continue to fade from the market, falling by 36% in 2010 after a 40% drop in 2009.

Figure 1: Worldwide TV Market by Technology



Source: DisplaySearch [Quarterly Advanced Global TV Shipment and Forecast Report](#)

2010 LED-Backlit LCD TV Shipments to Exceed 35 Million Units

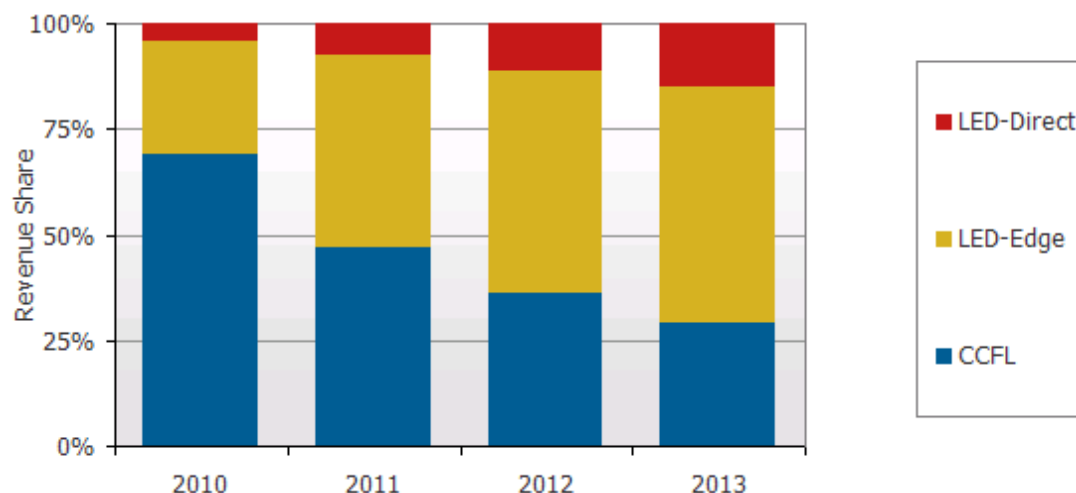
The LCD TV shipment outlook has been increased to 180 million units in 2010, driven in part by the rapid expansion of LED backlit models. In 2009, an estimated 3.6 million LED-backlit LCD TVs shipped worldwide, with more than half of that coming in Q4'09. For 2010, companies throughout the supply chain are gearing up for a more aggressive rollout of LED models.

“LED-backlit LCD TVs carried a significant premium in 2009 over CCFL-backlit counterparts, more than 100% on average above 40" screen sizes,” noted [Paul Gagnon](#), Director of North America TV Market Research. “However, the increased level of competition among manufacturers in 2010, with LED models comprising more than 50% of some lineups, will drive that average premium down to less than 70% over 40" and as low as 17% at 22-24". Overall, this should push the LED-

backlit LCD TV market to more than 35 million units or 20% of total LCD TV shipments worldwide."

DisplaySearch is now tracking LCD TV shipments by backlight type, breaking the market into edge-type and direct-type (full-array). For 2010 as a whole, almost 90% of LCD TVs will be of the edge-type variety. This is due to the lower cost associated with using a smaller number of LEDs at the perimeter, as well as the attractive thin and light form factor.

Figure 2: LCD TV Market Revenue Share by Backlight Type



Source: DisplaySearch [Quarterly Advanced Global TV Shipment and Forecast Report](#)

The high frame-rate segment of the LCD TV market also continues to expand, with 120 Hz and higher frame rates accounting for about 22% of LCD TV unit shipments in 2010. At larger screen sizes, the 120 Hz+ share jumps to more than 50%. Of course, on a revenue basis, the share is much higher due to the market premiums associated with high frame-rate models.

The DisplaySearch Q1'10 [Quarterly Advanced Global TV Shipment and Forecast Report](#) includes panel and TV shipments by region and by size for nearly 60 brands, and also includes rolling 16-quarter forecasts, TV cost/price forecasts and design wins. This report is delivered in PowerPoint and includes Excel-based data and tables. For more information on the report, contact Charles Camaroto at 1.888.436.7673 or 1.516.625.2452, email contact@displaysearch.com, or contact your contact your regional DisplaySearch office in [China, Japan, Korea or Taiwan](#).

Learn more about DisplaySearch's TV market forecast at the [DisplaySearch Taiwan FPD Conference](#), to be held on April 8-9 at the Taipei International Convention Center in Taipei, Taiwan, and the [SID DisplaySearch Business Conference](#) on May 24 during SID Display Week in Seattle, Washington. For more information on these events, visit www.displaysearch.com/events.

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