

## Global TV Shipment Growth Improves to 15% Y/Y in Q4'10 as LCD Share Surges

Santa Clara, California, February 22, 2011—Global TV shipment growth improved in Q4'10 after falling sharply in Q3'10, rising 15% Y/Y to a record 77.6 million units, according to the figures released in the latest DisplaySearch [Quarterly Advanced Global TV Shipment and Forecast Report](#). The improvement in annual growth rate, which had fallen to 9% Y/Y in Q3'10, can be attributed to improved growth in developed markets, particularly North America, which had experienced a substantial slowdown during the first half of the year. China was the only region to decline in Q4'10, falling 2% Y/Y as a significant decline in CRT TV shipments more than offset growth of LCD and plasma.

For the first time since Q1'10, LCD TV had stronger Y/Y growth than plasma TV, as prices for LED-backlit LCD TV models fell a little faster—increasing LED share to 30% for the first time. Prices for standard CCFL-backlit LCD TVs also fell a little more quickly because panel price declines upstream in the supply chain worked through to retail prices. Plasma TV growth continued to be quite positive, rising 20% Y/Y, although there are signs that the growth rate is starting to slow as LCD TV prices have become competitive at several key sizes, particularly 42". Global CRT TV shipments continue to contract at a rate of about 30% Y/Y each quarter.

"Demand for flat panel TVs remains strong. However, consumers held off on purchases during a very stable pricing period in 1H'10" noted [Paul Gagnon](#), Director of North America TV Research for DisplaySearch. Gagnon added, "LCD TV panel prices started falling in July, but due to the length of the supply chain, it takes about a quarter for those prices to be realized at retail."

Table 1: Q4'10 Worldwide TV Shipments by Technology (000s)

Technology	Q4'10 Units	Q4'10 Unit Share	Q/Q Growth	Y/Y Growth
LCD TV	63,506	81.8%	39%	26%
PDP TV	5,662	7.3%	17%	20%
OLED TV	0.4	0.0%	159%	-1%
CRT TV	8,358	10.8%	-10%	-32%
RPTV	65	0.1%	80.6%	28%
Total	77,592	100%	30%	15%

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

Improving shipment growth in regions like Japan, North America and Western Europe meant the developed regions regained the lead in total flat panel shipments. In particular, Japan, a market with very high flat panel TV household penetration, saw total TV shipments increase more than 100% Y/Y, to more than 10M units for the first time ever, as consumers rushed to take advantage of the government sponsored Eco-Points program before it ends in early 2011. North America shipments were substantially stronger in Q4'10 than at any other time during the year, because brands and retailers anticipated better demand during the holiday season as a result of more attractive pricing, especially in discount channels and for value-priced products.

### Advanced Features Continue to Gain Share, Especially as Premiums Decline

DisplaySearch has implemented a new process of surveying for 3D TVs, and is now reporting historical data and forecasts on shipments, revenue, and pricing of 3D TVs, broken down by brand, region, technology, size and other features. Based on this new research, DisplaySearch reports that 3D TVs accounted for about 9% of total TV revenues worldwide in Q4'10, and much more in certain segments, like 40"+ 120 Hz LCD TVs, which were nearly 20% 3D in Japan.

LED-backlit LCD TVs also continued to grow share, rising to 30% of total LCD TV unit shipments for the first time, while 120 Hz and higher frame rates accounted for just under a quarter of LCD units. LED premiums are falling rapidly, dropping from more than 50% in Q3'10 to less than 40% in Q4'10 for 32" sets. This has been made possible through improvements in LED component costs and a reduction in the number of LEDs required in a given design due to improved efficiency.

### Samsung Remains Top Brand Worldwide

Samsung was the #1 brand on a revenue basis, with a 21.2% share of total global TV revenues and a 21.4% share of global flat panel TV revenues. For the full year 2010, Samsung remained #1

in flat panel TV, although their share fell about a point from 2009 on growth from LGE as well as increases by Japanese brands due to the strong home market. Samsung was the #1 LCD TV brand in Q4'10, and Panasonic was the #1 plasma TV brand. By region, Samsung was #1 in LCD TV unit share in most markets during 2010. However, Chinese brands still dominate the domestic China market, and Vizio moved past Samsung on a volume basis for LCD TVs in North America.

For 3D TV, Sony was the top 3D LCD TV brand on a unit shipment basis in Q4'10, and Panasonic was the top 3D PDP TV brand. However, in total combined 3D TV shipments across all technologies, Samsung was the leader.

Table 2: Q4'10 Worldwide Flat Panel TV Brand Rankings by Revenue Share

Rank	Brand	Q3'10 Share	Q4'10 Share	Q/Q Growth	Y/Y Growth
1	Samsung	21.6%	21.4%	27%	2%
2	Sony	11.8%	14.2%	54%	34%
3	LGE	13.5%	12.7%	20%	18%
4	Panasonic	9.1%	8.3%	15%	13%
5	Sharp	8.0%	8.1%	29%	67%
	Other	36%	35.3%	25%	8%
	Total	100.0%	100.0%	28%	15%

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

DisplaySearch TV market intelligence, including panel and TV shipments, TV shipments by region, brand, size, resolution, frame rate, backlight type and now 3D for nearly 60 brands, rolling 16-quarter forecasts, TV cost/price forecasts and design wins can be found in its [Quarterly Advanced Global TV Shipment and Forecast Report](#). For more information about the report, please contact Charles Camaroto at 1.888.436.7673 or 1.516.625.2452, e-mail [contact@displaysearch.com](mailto:contact@displaysearch.com) or contact your regional DisplaySearch office in China, Japan, Korea or Taiwan or more information.

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