

■ 120 Hz Panels Accounted for 27% of 40" and Larger LCD TV Panels in Q3'08; TMDisplay Led in LED Backlight Notebook Panels Shipments, According to DisplaySearch

Austin, Texas, November 24, 2008—Analysis from DisplaySearch's [Quarterly Large-Area TFT LCD Shipment Report](#) reveals the latest trends for 120 Hz double frame rate LCD TV panels and for notebook panels with LED backlights. Shipments of 120 Hz LCD TV panels reached 3.6 million units in Q3'08, which is 57% growth from 2.3 million units in Q2'08. In Q3'08, 120 Hz panel shipments has accounted for 16% of all 32" and above and 27% of 40" and above LCD TV panels. Meanwhile, due to cost reductions and the launches of new notebook PC models, shipments of notebook panels with LED backlights grew by 69% Q/Q to 2.2 million in Q3'08 from 1.3 million in Q2'08. The share of LED backlights in notebook panels reached 5.4% in Q3'08 and is expected to reach 12.2% in Q4'08.

Table 1 summarizes shipments of large-area TFT LCD panels with these two important features.

Table 1: 120 Hz and LED Backlight Panel Shipments (million units) and Penetration

Application	Item	Q2'08 Shipments	Q3'08 Shipments	Q/Q Growth	Y/Y Growth
LCD TV	32" + panel shipments	19.8	22.8	15%	33%
	120 Hz panel shipments	2.3	3.6	57%	21%
	120 Hz penetration	12%	16%		
Notebook PC	All NB panel shipments	37.9	38.6	2%	21%
	LED Backlight panel shipments	1.3	2.2	69%	220%
	LED penetration	3.4%	5.8%		

*In this table, notebook PCs include 10.1" and 10.2" mini-note panels.

DisplaySearch's results showed that for 120 Hz panel shipments, the penetration grows as the panel size increases because of promotion by panel makers and the TV brands. In Q3'08, the highest penetration of 120 Hz appeared in the 52" and above segment, in which the 120 Hz share is 59%, followed by 41% in 46" and 47", 25% in 42", 22% in 40", 10% in 32" full HD panels, and 6% in 32" HD panels.

Samsung is the worldwide leader in 120 Hz LCD TV panel shipments due to the demand from its major TV customers: Samsung and Sony.

Table 2 shows the 120 Hz LCD TV panel shipment share by supplier.

Table 2: 120 Hz LCD TV Panel Shipment Share and Major Sizes by Supplier (Q3'08)

Panel Suppliers	Q3'08	Major 120 Hz Panels
Samsung	37%	40", 46", 52"
Sharp	25%	32", 42", 46", 52"
LG Display	20%	32", 37", 42", 47"
AUO	9%	40", 46"
IPS-Alpha	8%	32"
CMO	1%	

For notebook panels with LED backlights, penetration in Q3'08 reached a new high of 5.8%, compared with 3.4% in Q2'08. With adoption triggered by the low cost and new LED backlight structures, estimates from notebook panel makers suggest 12.2% penetration in Q4'08. As notebook brands including HP, Dell and Acer are planning to launch many new LED notebook models in the first half of 2009, it is expected that the penetration of LED backlights into notebook panels will pass 25% in Q2'09. In Q3'08, 12.1", 13.3" and 15.4" were the leading sizes of LED backlight notebook panels. It is expected that new 16:9 panels will largely adopt LED backlights in 2009. TMDisplay, which is mainly shipping 12.1" and 13.3" panels with LED backlights, is the leader, followed by AUO and LG Display (Table 3).

Table 3: Notebook LED Backlight Panel Share by Supplier (Q3'08)

Panel Suppliers	LED Backlight Panel Share in Q3'08
TMDisplay	36%
LG Display	22%
AUO	21%
Samsung	11%
Hydis	2%
CMO	8%
Total	100%

The DisplaySearch [Quarterly Large-Area TFT LCD Shipment Report](#) is the first report to track 120 Hz LCD TV panel shipments by suppliers and size, as well as notebook panels using LED backlights by suppliers and size, on a quarterly basis. For more information, contact DisplaySearch at +1.512.687.1511 or sales@displaysearch.com.

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