

North America TV Shipments Surge 28% Y/Y in Q2'08; Samsung Achieves Record Share

AUSTIN, TEXAS, August 14, 2008—Despite a weaker US economy and rising energy prices that directly impact consumers budgets, North American TV shipments climbed a remarkably strong 26% Q/Q and 28% Y/Y in Q2'08 to more than 9.3M units, according to preliminary results from DisplaySearch's *Quarterly Global TV Shipment and Forecast Report*. This Y/Y growth is the strongest since DisplaySearch began tracking TV shipments in 2004. LCD and Plasma TV technologies both posted strong sequential quarterly gains, rising 30% and 35%, respectively. PDP growth in particular was influenced by strong initial shipments of Vizio's 32" HD PDPs; LCD growth was also very strong at 32", rising 35% Q/Q.

Some other highlights from Q2'08 include

- LCD TV shipments rose a stronger than expected 52% Y/Y in Q2 to nearly 7.5M units, driving the total TV growth to such strong levels. Much of the growth came from small- to mid-range screen sizes, such as 19", 22" and 32" where price points are lower and consumers don't have to stretch budgets as much to afford a new digital flat panel TV.
- PDP shipment growth surged in Q2 by 35% Q/Q and 34% Y/Y as 32" HD shipments were initiated by Vizio into the US market, quickly rising to almost 13% of all PDP shipments for the quarter. 42" PDP shipments also rose in Q2, climbing 86% Q/Q, but 50" PDP shipments were flat Q/Q as LCD proved a tough competitor at 50-54".
- Overall LCD TV gained share during the quarter, rising from 77.5% to 79.8% unit share, a new high. LCD TV also gained against PDP in the 50-54" size category, rising to a new high of 46.1% with most 52" LCD TVs selling at a substantial premium to comparable PDP models. LCD did drop from 97.7% to 93.6% of shipments at 32" though, as 32" HD PDP entered the size category during the quarter.
- Samsung was the leading brand with total TV shipment share surging to a record 19.1% of all TV unit shipments in North America during the quarter. Samsung continued to have the leading LCD TV unit share in Q2, climbing from 13.5% to 18.3% as their shipments rose 76% Q/Q. Additionally, Samsung overtook Sony for the top LCD TV unit share of the 40"+ category.
- Sony remained #2 in LCD TV, although their share dropped from 13.4% to 11.7%. Despite gaining share in the 32" category, they lost share in the 40"+ space to Samsung. Sony also rose from #3 to #2 in total TV shipments, although unit share fell from 10.6% to 9.4%.
- Panasonic was still the North America market leader in PDP TV at 31.2%, down from 35% in Q1'08 as both Samsung and Vizio posted strong share gains. Panasonic led 50" shipments by a large margin, while barely edging out Samsung for #2 at 42". Q2'08 also marked the first full quarter of 46" 1080p PDP shipments for Panasonic and easily led all other brands in 1080p PDP shipments.
- Vizio moved up to #2 in PDP, overtaking Samsung, with their share more than doubling to 25.1% on the previously mentioned strong 32" HD PDP shipments. In LCD TV, Vizio fell from #3 to #5 at 7.5% unit share, as intense price competition from top brands at a wide range of retail outlets which pushed them from #2 to #3 in total TV unit share.

More extensive Q2'08 results can be seen in the following tables:

Table 1: Preliminary Q1'08 – Q2'08 NA Flat Panel TV Unit Share and Growth

Rank	Brand	Q1'08 Unit Share	Q2'08 Unit Share	Q/Q Growth	Y/Y Growth
1	Samsung	14.0%	18.9%	75%	147%
2	Sony	11.7%	10.4%	15%	185%
3	Vizio	12.7%	9.5%	-3%	18%
4	LGE	8.5%	8.2%	23%	80%
5	Sharp	8.1%	6.9%	9%	28%
	Other	45.0%	46.1%	32%	22%
	Total	100.0%	100.0%	29%	49%

Table 2: Preliminary Q1'08 – Q2'08 NA LCD TV Unit Share and Growth

Rank	Brand	Q1'08 Unit Share	Q2'08 Unit Share	Q/Q Growth	Y/Y Growth
1	Samsung	13.5%	18.3%	76%	155%
2	Sony	13.4%	11.7%	15%	185%
3	LGE	8.1%	7.8%	27%	91%
4	Sharp	9.3%	7.8%	9%	28%
5	Vizio	13.2%	7.5%	-25%	-7%
	Other	42.6%	46.9%	38%	29%
	Total	100.0%	100.0%	28%	52%

Table 3: Preliminary Q1'08 – Q2'08 NA Plasma TV Unit Share and Growth

Rank	Brand	Q1'08 Unit Share	Q2'08 Unit Share	Q/Q Growth	Y/Y Growth
1	Panasonic	35.0%	31.2%	20%	28%
2	Vizio	10.5%	25.1%	223%	225%
3	Samsung	19.8%	24.2%	65%	107%
4	LGE	13.6%	10.7%	6%	35%
5	Sanyo	2.3%	3.2%	88%	48%
	Other	18.8%	5.6%	-60%	-73%
	Total	100.0%	100.0%	35%	34%

DisplaySearch's TV market intelligence, including panel and TV shipments, TV shipments by region by brand by size for nearly 60 brands, rolling 16-quarter forecasts, TV cost/price forecasts and design wins can be found in its [Quarterly Global TV Shipment and Forecast Report](#). For more information on this report, please contact Carl Holec at (512) 687-1505 or Carl_Holec@displaysearch.com.

To participate in strategic networking amongst TV-related experts and industry leaders or for information on market and technology trends affecting the TV industry, attend the *2008 HDTV Conference: Confronting the New Reality* on September 15-17, 2008 in Los Angeles. To register online, visit www.displaysearch.com/hdtv.

About DisplaySearch

DisplaySearch, an NPD Group company, has a core team of 58 employees located in Europe, North America and Asia who produce a valued suite of FPD-related market forecasts, technology assessments, surveys, studies and analyses. Visit the [DisplaySearch blog](#) to read about how our top analysts are interpreting up-to-the-minute issues that impact the display industry, and join us in this discussion about technology and the flat panel industry. The company also organizes influential events worldwide. Headquartered in Austin, Texas, DisplaySearch has regional operations in Chicago, Houston, Kyoto, London, San Diego, San Jose, Seoul, Shenzhen, Taipei and Tokyo, and the company is on the web at <http://www.displaysearch.com/>.

About The NPD Group, Inc.

The NPD Group is the leading provider of reliable and comprehensive consumer and retail information for a wide range of industries. Today, more than 1,600 manufacturers, retailers and service companies rely on NPD to help them drive critical business decisions at the global, national and local market levels. NPD helps our clients to identify new business opportunities and guide product development, marketing, sales, merchandising and other functions. Information is available for the following industry sectors: automotive, beauty, commercial technology, consumer technology, entertainment, fashion, food and beverage, foodservice, home, office supplies, software, sports, toys and wireless. For more information, contact us or visit the [NPD website](#).

Contact

Sign up for free email information services at www.displaysearch.com/subscribe. You can read our analysts' blog at <http://www.displaysearchblog.com/> and follow us on Twitter at [@DisplaySearch](#).

For more information on DisplaySearch analysts, reports and industry events, contact DisplaySearch at contact@displaysearch.com or visit us at <http://www.displaysearch.com/>.

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