

■ Global TV Shipments Up 11% Y/Y in Q2'08 on Strong Growth in North America and Among Flat Panel Technologies

AUSTIN, TEXAS, August 21, 2008—Global TV shipments improved a robust 11% Y/Y to 47.5M units in Q2'08, which was up 3% Q/Q, with better than expected shipment growth in North America according to the latest figures from DisplaySearch's [Quarterly Global TV Shipment and Forecast Report](#). LCD TV was once again a hot technology, rising 47% Y/Y to 23.7M units. Plasma TV exhibited even stronger growth, rising 52% Y/Y to 3.4M units, thanks largely to the reintroduction of 32" into the North American market and wider availability of 1080p models.

North America enjoyed particularly strong growth in Q2 with total TV shipments surging 28% Y/Y after just 5% Y/Y growth in Q1'08 and negative growth during most of 2007. The strong shipments in North America reflect introduction of new, lower-cost, flat panel TV models to the US market by top-tier brands in the latter part of the quarter and a consumer that was very receptive to these lower price points.

Globally, flat panel TV share rose from 52% in Q1'08 to 57% in Q2'08 as LCD regained unit share lead from CRT, climbing to nearly 50% of all TV shipments worldwide. Some other highlights from Q1'08 include

- LCD TV took share from other technologies in all regions, except Japan, rising to a record 49.8% unit share. Developed regions like North America, Japan and Western Europe already have very high levels of LCD TV share at 80%, 85% and 87%, respectively. Developing regions are continuing to see a quickening transition from CRT to LCD, mostly at smaller screen sizes, as flat panel TV prices fall more rapidly. Currently, LCD TV accounts for 28% of TV shipments in developing regions. Samsung expanded their leading global LCD TV shipment share to a record 20.4% with Sony #2 at 13.0% and LGE #3 at 10.0%.
- Plasma TV shipments during the quarter got a lift from new size and resolution categories, such as 32" HD, introduced by Vizio to North America during Q2'08, and 46" 1080p from Panasonic. Both sizes did not exist a year earlier. All regions enjoyed Y/Y Plasma TV shipment growth, led by China, where units rose 285% Y/Y. Plasma's share of the overall TV market reached a record 7.1%. Panasonic remained the leading PDP TV brand globally, with 32.9% unit share, followed by Samsung at 21.1% and LGE at 17.4%.
- 32" shipments climbed to the second highest level ever at just over 9M units, mostly in the form of LCD TVs, up 41% Y/Y. This is the strongest growth in more than year as LCD panel supply increased on better fab utilization, causing panel prices to decline more than expected. Other screen sizes with stronger than 40% Y/Y growth include 15-19", 22-24", 40-44", 45-49" and 50-54".

A review of global TV shipment performance by technology can be seen in Table 1 below:

Table 1: Q2'08 Worldwide TV Shipments by Technology (000s)

Technology	Q2'08 Units	Q2'08 Unit Share	Q/Q Growth	Y/Y Growth
LCD TV	23,668	49.8%	12%	47%
PDP TV	3,391	7.1%	22%	52%
OLED TV	1	0.0%	-35%	N/A
CRT TV	20,388	42.9%	-8%	-16%
RPTV	96	0.2%	-28%	-85%
Total	47,545	100%	3%	11%

On a brand basis, Samsung was the global brand share leader in revenues for the tenth straight quarter, expanding their share to a record 22.8%, more than 10 share points higher than #2 Sony, on robust 52% Y/Y growth. Samsung also had the top ranking on a unit basis and led both LCD and MD RPTV on a unit and revenue basis. Sony was #2 on a revenue basis for the fourth straight quarter with very strong Y/Y growth, but declining in share slightly to 12.5%. LGE remained #3 with their share nearly unchanged at 11.5%, and they led in global CRT shipments. A complete review of the top five brands can be seen in the following table:

Table 2: Q2'08 Worldwide TV Brand Rankings by Revenue Share

Rank	Brand	Q1'08 Share	Q2'08 Share	Q/Q Growth	Y/Y Growth
1	Samsung	20.7%	22.8%	18%	52%
2	Sony	13.2%	12.5%	2%	49%
3	LGE	11.6%	11.5%	6%	33%
4	Panasonic	7.0%	8.4%	29%	23%
5	Sharp	7.3%	6.8%	0%	10%
	Other	40.2%	38.0%	1%	-1%
	Total	100.0%	100.0%	7%	20%

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 or your local DisplaySearch representative for details and pricing.

To participate in strategic networking with TV-related experts and industry leaders and to acquire 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. Discounted hotel room rates expire August 25, 2008. To register online, visit www.displaysearch.com/hdtv.

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