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DisplaySearch Reports Stronger Than Expected Plasma Panel Growth as Q3'08 Shipments Rise 37% Y/Y to 4.2M Units

AUSTIN, TEXAS, October 30, 2008—Plasma panel makers continue to report strong growth with Q3'08 plasma panel shipments rising 18% Q/Q and 37% Y/Y to nearly 4.2M units, the second highest quarterly shipment total ever and 6% higher than expected, according to the latest DisplaySearch *Quarterly Global TV Shipment and Forecast Report, Plasma and LCD TV Panel Shipment Module*. Demand continues to be strong for plasma TVs worldwide due to attractive price points and increasing availability of high-definition content and the 2008 shipment target of 15.5M units is on target.

Additional notable developments from the Q3'08 shipment results include

The 1080p share of plasma panel unit shipments remained over 20%, after strong growth in Q2'08, rising to a record 856K units in Q3'08. Panasonic remained the dominant supplier of 1080p PDP plasma panels, accounting for 70% of units shipped. Samsung was the #2 1080p plasma panel supplier at 15% unit share.

50" shipments continued to account for a growing share of plasma panel shipments, rising from 26% to a record 29% of units. However, 42" continues to be the most popular screen size at 49% of units, though this is the first quarter where 42" shipment share was less than 50%.

32" continues to be an important category of growth for plasma panels, rising 20% Q/Q to 486K units and accounting for nearly 12% of shipments. All of the growth came from ED resolution panels which were popular in developing markets due to low pricing.

"The HD share of 32" plasma panel shipments declined, falling from 37% to 23% of units, as 32" LCD panel prices declined rapidly in Q3'08, thereby reducing the attractive pricing advantage plasma enjoyed in the 32" TV category," noted Paul Gagnon, DisplaySearch Director of North America TV Market Research. "In addition, aggressively lower retail prices at the end of Q3'08 for 42" and 50" HD plasma TVs are leading to a surge in demand for these models worldwide, especially in North America, and pushing overall plasma panel shipments sharply higher."

The top two plasma panel suppliers, both vertically integrated, reported strong shipment growth in Q3'08. Panasonic maintained the #1 plasma panel supplier revenue position in Q3'08, with a 3 point increase to a 39.8% share on 37% Y/Y plasma panel revenue growth. This was the highest growth of any supplier, due to record shipments of 50" panels. Samsung SDI was the #2 plasma panel supplier on a revenue basis, but their revenue share declined by almost 2 points despite having 30% Y/Y revenue growth. LGE was #3 with a 22% revenue share on weaker 8% Y/Y growth. Pioneer moved up to #4, as Hitachi fell to #5 on a 26% Y/Y decline in plasma panel revenues.

Table 1: Plasma Panel Revenue Share and Growth by Supplier

Rank	Supplier	Q2'08 Share	Q3'08 Share	Y/Y Growth
#1	Panasonic	36.8%	39.8%	37%
#2	Samsung SDI	31.0%	29.4%	30%
#3	LGE	24.0%	21.9%	8%
#4	Pioneer	3.3%	4.7%	-3%
#5	Hitachi	4.8%	4.1%	-26%
#6	Orion	0.1%	0.1%	10%
	Total	100.0%	100.0%	21%

For detailed plasma module shipments, plasma fab activity, plasma supply/demand, plasma TV shipments by brand and region, and rolling 16-quarter plasma shipment, cost and pricing forecasts, please see the latest *Quarterly Global TV Shipment and Forecast Report, Plasma and LCD TV Panel Shipment Module*. For information on any DisplaySearch report, contact Carl Holec for additional information at 1.512.687.1505, or info@displaysearch.com or contact your regional DisplaySearch office in China, Europe, Japan, Korea or Taiwan.

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