

## ■ Worldwide OLED Revenues Up 60% Y/Y in Q3'08, But Still Face Strong Price Competition from LCDs; RiTdisplay #1 in OLED Shipments, Passing Samsung SDI

AUSTIN, TEXAS, December 10, 2008—In its latest Q4'08 [Quarterly OLED Shipment and Forecast Report](#), DisplaySearch reported that the worldwide OLED display revenue in Q3'08 was US\$141 million, down 11% Q/Q but up 60% Y/Y.

Chi Mei EL, the #2 supplier of AMOLED displays, posted record high shipments in Q3'08, while the leading AMOLED supplier Samsung SDI—which will merge with Samsung Electronics' small/medium business to form Samsung Mobile Display in January—experienced lower shipments Q/Q. As a result, AMOLED shipments increased only slightly compared to Q2'08, reaching 1.7 million units.

After a strong Q2, PMOLED shipments were affected by reductions in mobile phone sub-display orders, so shipments fell 22% Q/Q. However, most of the shipment reduction was in monochrome PMOLED, while area color and full color PMOLED gained popularity. This led to an increase in average selling price for OLEDs in Q3'08.

“OLED displays have very attractive performance: wide viewing angle, wide color gamut at all gray scales, fast response time, low power consumption, thin/light weight and wide operating temperature. Lifetime has improved dramatically in recent years, and red and green lifetimes are long enough for many consumer electronic applications. Despite this, OLEDs still face strong price competition from TFT LCDs and PM LCDs,” said [Jennifer Colegrove](#), PhD, Director of Display Technologies at DisplaySearch.

“The OLED display industry is changing rapidly, with new companies entering the business, existing companies expanding capacity or exiting the market, and other companies changing their application focus,” added Dr. Colegrove.

In its latest Q4'08 [Quarterly OLED Shipment and Forecast Report](#), DisplaySearch analyzes the dynamic of OLED display industry: shipments by each supplier; AMOLED vs. PMOLED; small molecule vs. polymer; monochrome vs. area color vs. full color; and shipments by application, such as mobile phone main display, sub-display, MP3, auto console, car audio, digital still camera, near-eye, TV and others.

RiTdisplay passed Samsung SDI to take the lead in total OLED shipments with 36% market share. Samsung SDI is #2 in shipments, but still the leader in total OLED revenues thanks to its AMOLED shipments. TDK passed Pioneer to become #3 in shipments at 17%, while Pioneer fell to the #4 position at 12%; Univision was #5. The top five suppliers accounted for over 95% of total OLED shipments in Q3'08, as shown in the following table.

Table 1: Top Five OLED Suppliers and Share in Q3'08

Rank	Supplier	Q3'08 Market Share
1	RiTdisplay	36%
2	Samsung SDI	26%
3	TDK	17%
4	Pioneer	12%
5	Univision	4.4%
	Others	4.6%
	Total	100.0%

Source: DisplaySearch Q4'08 [Quarterly OLED Shipment and Forecast Report](#)

Given the challenging economic climate and pressure from LCDs, DisplaySearch has revised its total OLED forecast for 2008 to 2015 downward from the previous forecast. However, there are new AMOLED applications, and several categories will gain momentum in 2009 and beyond. The forecast analysis includes these factors:

- OLED supply/demand analysis
- New OLED fab activity and capacity
- OLED penetration in medium and large size applications

The DisplaySearch [Quarterly OLED Shipment and Forecast Report](#) includes shipments, revenues and ASPs by supplier, application, material type and driver technology. It also shows capacity plans by supplier and has a comprehensive supply/demand forecast. This report is delivered in PowerPoint

and includes Excel pivot tables. If you need further information or assistance please contact us at +1.512.687.1511 or [sales@displaysearch.com](mailto:sales@displaysearch.com), or at the local DisplaySearch offices in China, Japan, Korea, Taiwan and the United Kingdom.

Media interested in speaking further with [Jennifer Colegrove](#), DisplaySearch's new OLED expert, to learn more about the latest trends and outlook of this burgeoning segment should contact Stacey Voorhees via e-mail at [Stacey@savvypublicrelations.net](mailto:Stacey@savvypublicrelations.net) or call 925-336-9592.

#### About DisplaySearch

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#### Contact

To contact DisplaySearch, call 1.888.436.7673 or 1.516.625.2452 or email [contact@displaysearch.com](mailto:contact@displaysearch.com)

Media contact Stacey Voorhees, 1.925.336.9592 or email [media@displaysearch.com](mailto:media@displaysearch.com)  
<http://www.displaysearch.com/>  
<http://www.displaysearchblog.com/>