

■ DisplaySearch Report Indicates Top LCD TV OEMs and Brand/OEM/Panel Supplier Relationships by Size; Samsung #1 Due to Strength at Key Sizes

AUSTIN, TEXAS, December 19, 2006—DisplaySearch, the worldwide leader in display market research, has released its Q3'06 [LCD TV Value Chain Report](#). The report analyzes the supply relationship between LCD TV module suppliers, LCD TV OEM manufacturers and LCD TV brands. According to the Q3'06 report, 23% of the 10.8 million LCD TV units shipped were made by external OEMs with the remaining 77% of LCD TVs produced by LCD TV brands' in-house production lines. Some brands intend to increase their outsourcing share for certain regions and products as the market expands, while other brands intend to bring more volume in-house as they expand into new regions. The [LCD TV Value Chain Report](#) represents an excellent means of tracking these trends by manufacturer.

Highlights of the Q3'06 [LCD TV Value Chain Report](#) include

- Many LCD TV brands outsourced 100% of their LCD TV set manufacturing, such as Dell, Grundig, HP, Polaroid, Relysis, Vizio, ViewSonic, Westinghouse and Syntax-Brilliant.
- In Q3'06, 77% of the LCD TV sets shipped were made at LCD TV brand in-house factories or TV assembly lines. 23% were outsourced to the subcontracted manufacturers such as TPV, Jabil, AmTRAN, Quanta and Vestel.
- 14.9 million LCD TV modules were shipped from TFT LCD makers. LCD TV manufacturers shipped 10.8 million units. The variances were mainly due to supply chain, assembly lead time, buffer stocks and channel inventory.
- As shown in Table 1 below, Samsung led the TV set manufacturers with 13.2% share in Q3'06, closely followed by Sharp. Jabil was the only manufacturer in the top 10 that was not also a TV brand.
- The top 7 suppliers are listed in Table 2 along with their top customers ranked by volume. As indicated, Philips, Samsung, Sharp and Sony were the top customers for 6 of the top 7 suppliers. In addition, each of the top 5 suppliers looked to their top 5 customers for at least 49% of their volume.

Table 1: Top 10 LCD TV Set Manufacturers and Main LCD TV Brand Customers

	LCD TV Set Manufacturers	Market Share in Q3'06 (%)
1	Samsung	13.2%
2	Sharp	13.0%
3	Sony	10.3%
4	LGE	7.4%
5	AOC (TPV)	6.6%
6	Funai	5.3%
7	Panasonic	4.4%
8	Toshiba	4.0%
9	Jabil	2.9%
10	TTE	2.1%

Table 2: Top 5 Customers' Share of LCD TV Module Makers' Shipments in Q3'06

Rank	LCD TV Module Makers	Top Customers (Unit Basis)	Top 5 LCD TV Customers' Unit Share
1	LPL	Philips, LGE, Panasonic, Toshiba, AmTRAN	62%
2	Samsung	Sony, Samsung, Panasonic, JVC, Sanyo	84%
3	AUO	Samsung, Philips, Toshiba, Panasonic, LGE	61%
4	CMO	Funai, Xococo, Westinghouse, Proview, TTE	49%
5	Sharp	Sharp, Philips, JVC, Mitsubishi, Panasonic	89%
6	CPT	Philips, Funai, Konka, Samsung, TPV	65%
7	QDI	Sharp, Philips	100%

The top LCD TV OEMs by size are shown in Table 3. As indicated, Samsung led at 26"-27" and 32" and was #2 at 40". These three sizes accounted for a 55% share of Q3'06 shipments. Philips was in the top 3 at each of the sizes it participated in below. Funai led the 20"-21" segment with a 16% share, Sharp had an even higher share at 37" at 21% while Sony and LGE dominated the 40" and 42" segments with 40% and 25% shares respectively.

Table 3: Q3'06 Top 5 LCD TV OEM Share by Size

Rank	20-21"	26-27"	32"	37"	40"	42"
1	Funai	Samsung	Samsung	Sharp	Sony	LGE
2	Sharp	Philips	Philips	Philips	Samsung	Philips
3	Philips	Sony	Sony	LGE	Hisense	Amtran
4	LGE	Sharp	Sharp	Toshiba	Changhong	Toshiba*
5	AOC	Panasonic	Panasonic	TTE	Others	TTE

*Tie between Toshiba and Amtran for #3 at 42".

According to David Hsieh, Vice President of DisplaySearch, "DisplaySearch's in-depth [LCD TV Value Chain Report](#) has quickly become an indispensable research tool for the TFT LCD industry. It's a comprehensive reference on the supply chain relationships between LCD TV module makers, LCD TV manufacturers and LCD TV brands." The [LCD TV Value Chain Report](#) is delivered quarterly in Excel format. For more information, contact Arie Braun (arie@displaysearch.com) or regional DisplaySearch offices in Japan, Korea, Taiwan and China.

About DisplaySearch

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