

## ■ Samsung SDI's AMOLEDs Reach Mass Production; Drives Q4'07 OLED Display Revenues to US\$158.8M, Up 82% Q/Q and 13% Y/Y

AUSTIN, TEXAS, March 6, 2008—Sony got all the attention in Q4'07 with the release of its 11" XEL-1 TV, but Samsung SDI drove the market, pushing shipments to 20.2M, which was up 30% Q/Q but down 9% Y/Y (see Table 3). For the year, total revenues grew 6% to US\$493.9M (see Table 1) and total shipments grew 8% to 74.7M, according to the DisplaySearch Quarterly OLED Shipment and Forecast Report. The report findings also show that the shipment mix is changing, as AMOLEDs had a 9.7% share of total revenues in Q3'07, which jumped to 41% in Q4'07.

"By Q1'08, DisplaySearch forecasts AMOLEDs will represent 55.6% of total revenues as LG Display enters the AMOLED market and Chi Mei EL, Samsung SDI and Sony continue to ramp up," noted Barry Young, Senior Advisor, DisplaySearch.

Key findings in the report include

- Samsung SDI was #1 in total revenue with US\$79.4M, more than double the #2 supplier RiTdisplay at US\$30.3M.
- RiTdisplay retained its lead in shipments at 6.6M units with Samsung SDI following at 4.9M units. Pioneer was #3 in units and #3 in shipments.
- Sony shipped 2K 11" displays for use in the XEL-1 in December and is expected to ship 6K panels in Q1'08.
- Chi Mei EL increased its production of AMOLED panels, shipping 60K units in Q4'07 up from 16K in Q3'07.
- LG Display, formerly LG. Philips LCD, took over LGE's PMOLED fab and is expected to ship ~150K AMOLED panels in Q1'08 for use in the recently announced LG-SH150A.

"AMOLEDs are beginning to hit their stride in the small/medium market with Nokia, Samsung, LG and Sony Ericsson all releasing products in Q4'07. We expect to see multiple product introductions in the next two quarters, and the panel size will jump to 2.6" and larger compared to previously announced 2.2-2.4" models," Young added.

Due to a strong fourth quarter, total OLED 2007 revenues reached US\$493.9M, a new record, led by Samsung SDI, RiTdisplay and Pioneer (see Table 1). Showing strong results in microdisplays, eMagin slipped into the top five for the first time.

Table 1: Total OLED Manufacturers' 2007 Revenue Market Share and Growth (US\$ Millions)

Rank	Company	2007 Revenue	Market Share	Y/Y Growth
1	Samsung SDI	\$156.7	31.7%	57%
2	RiTdisplay	\$107.9	21.8%	36%
3	Pioneer	\$90.6	18.3%	33%
4	TDK	\$25.3	5.1%	-18%
5	eMagin	\$15.0	3.0%	105%
	Others	\$98.5	19.9%	-46%
	Total	\$493.9	100.0%	6%

The top five OLED manufacturers in Q4'07, shown in Table 2, accounted for a combined revenue market share of 91.9%.

Table 2: Total OLED Manufacturers' Q4'07 Revenue Market Share and Growth (US\$ Millions)

Rank	Company	Q4'07 Revenue (M)	Market Share	Y/Y Growth	Q/Q Growth
1	Samsung SDI	79.4	50.0%	205%	297%
2	RiTdisplay	30.3	19.1%	15%	-2%
3	Pioneer	23.7	15.0%	11%	41%
4	TDK	8.5	5.3%	43%	0%
5	eMagin	4.0	2.5%	-5%	59%
	Others	12.8	8.1%	-77%	26%
	Total	158.8	100.0%	13%	82%

Sub-displays and MP3 player displays continue to account for ~75% of OLED shipments at 9.9M and 5.3M, respectively. Main displays, due to the growth in AMOLEDs, are beginning to catch up and now have a 11.5% share, up from only 4.5% last quarter as shown in Table 3:

Table 3: Total OLED Applications' Q4'07: Shipments (000), Market Share and Growth

Rank	Application	Units (000)	Market Share	Y/Y Growth	Q/Q Growth
1	Sub-display	11043.5	54.7%	-10%	19%
2	MP3	5094.2	25.2%	-35%	22%
3	Main Displays	2,320.5	11.5%	137%	232%
4	Other/Industrial	878.6	4.4%	223%	10%
5	Car Audio	667	3.3%	4%	57%
	Others	183.0	0.9%	31%	6%
	Total	20,186.8	100.0%	-9%	30%

AMOLEDs are forecast to reach 3.1M units in Q1'08, up from 1.7M in Q4'07, driving total revenues up to US\$ 204.1M, which will set a new record for the industry.

DisplaySearch's [Quarterly OLED Shipment and Forecast Report](#) includes shipments, revenues and ASPs by application, material type, driver technology and supplier. 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. For information on the report, contact Arie Braun at 512.687.1505 or [arie@displaysearch.com](mailto:arie@displaysearch.com).

At its upcoming [US FPD Conference](#), Dr. H.K. Chung, Executive Vice President, Samsung SDI, will give a keynote presentation on Samsung SDI's AMOLED activities and Dr. Randy Waynick, Senior Vice President, Marketing, Home Products Division, Sony, will discuss Sony's activities in TVs including its 11" XEL-1 AMOLED TV launched in Q4'07. In the session entitled "OLEDs and Flexible Display Technology - When, Where & How," Young and other speakers will present the latest results, insights, forecasts and outlook for OLEDs and other emerging display technologies. Young's presentation will describe the existing market and the market leaders by application, define the challenges to growth and forecast the future use of OLEDs through 2012, in terms of applications, shipments and revenue. In addition, Young will provide an assessment of the flexible display market today as well as future growth prospects.

#### About DisplaySearch

DisplaySearch, an NPD Group company, has a core team of 59 employees located in Europe, North America and Asia who produce a valued suite of FPD-related market forecasts, technology assessments, surveys, studies and analyses. 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, visit <http://www.npd.com/>.

#### 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/>