

Samsung Reclaims Top LCD TV Share in North America; Vizio Overtakes Sony For #2 in Total Flat Panel Share

AUSTIN, TEXAS, May 7, 2008—After Sony posted the top LCD TV share in Q4'07, Samsung edged slightly higher to retake the #1 LCD TV ranking in North America for the first time since Q1'07, rising to 12.8% unit share in a very competitive category. Samsung maintained their share lead in combined flat panel TV comprising shipments of both LCD and Plasma TVs, according to preliminary findings from DisplaySearch's latest Global TV Shipment and Forecast Report. Other flat panel TV highlights from Q1'08 include

- LCD TV was a highly competitive category in Q1'08 with the top three brands—Samsung, Sony and Vizio—separated by less than half a point of unit share at 12.8%, 12.7% and 12.5%, respectively.
- Panasonic commanded the top share in Plasma TV by a large margin, accounting for 33% of Q1'08 shipments, down from their 38% share in Q4'07. #2 LG increased its share to slightly over 19%. Panasonic shipped the first 46" 1080p plasma models in Q1'08 to the North American market.
- Vizio posted their strongest combined flat panel TV share to date, rising from 10.3% in Q4'07 to 12.2% in Q1'08, overtaking Sony for #2 with distribution in the US only (rather than US and Canada like most other brands) and benefiting from and LCD + Plasma product strategy. Vizio also had the strongest Y/Y growth of any top five flat panel TV brand.
- Sony dropped to #2 in LCD TV and to #3 in combined flat panel TV after an exceptionally strong Q4'07. Sony did, however, leverage a strong focus on larger sizes to maintain a leadership position in 40" and larger LCD TVs, which they have held for 10 straight quarters. Sony's focus on larger sizes and typically higher average selling price will likely lead to a #1 revenue share position in LCD TV for the quarter.
- LGE moved up one position in Plasma as well as LCD TV, overtaking Samsung for #2 in plasma and replacing Polaroid as the #5 brand on a unit basis in LCD TV. LGE had the strongest Y/Y growth of any plasma brand and second strongest growth in LCD among the top five.
- LCD TVs posted solid shipment growth in Q1'08, beating estimates and climbing 59% higher than Q1'07. Plasma growth turned negative though, falling 9% Y/Y in Q1'08 after growth had finally turned positive again in Q4'07. Overall, flat panel TVs grew 46% Y/Y as a weak US economy in Q1'08 didn't seem to deter consumers or retail TV buyers.

More extensive Q1'08 results can be seen in the following tables.

Table 1: Preliminary Q4'07 – Q1'08 NA Flat Panel TV Unit Share and Growth

Rank	Brand	Q4'07 Unit Share	Q1'08 Unit Share	Q/Q Growth	Y/Y Growth
1	Samsung	13.5%	13.5%	-33%	37%
2	Vizio	10.3%	12.2%	-21%	103%
3	Sony	11.6%	11.3%	-35%	64%
4	LGE	7.7%	8.9%	-22%	84%
5	Sharp	7.5%	7.8%	-31%	15%
	Other	49.4%	46.3%	-37%	36%
	Total	100.0%	100.0%	-33%	46%

Table 2: Preliminary Q4'07 – Q1'08 NA LCD TV Unit Share and Growth

Rank	Brand	Q4'07 Share	Q1'08 Share	Q/Q Growth	Y/Y Growth
1	Samsung	12.6%	12.8%	-31%	49%
2	Sony	13.2%	12.7%	-35%	64%
3	Vizio	11.0%	12.5%	-23%	120%
4	Sharp	8.6%	8.8%	-31%	15%
5	LGE	6.9%	7.6%	-25%	94%
	Other	47.7%	45.5%	-36%	55%
	Total	100.0%	100.0%	-32%	59%

Table 3: Preliminary Q4'07 – Q1'08 NA Plasma TV Unit Share and Growth

Rank	Brand	Q4'07 Share	Q1'08 Share	Q/Q Growth	Y/Y Growth
1	Panasonic	38.4%	32.8%	-47%	16%
2	LGE	13.7%	19.2%	-12%	59%
3	Samsung	20.3%	18.4%	-44%	-4%
4	Vizio	5.7%	9.8%	7%	13%
5	Hitachi	8.7%	6.8%	-51%	-20%
	Other	13.3%	12.9%	-40%	-61%
	Total	100.0%	100.0%	-38%	-9%

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 Patrick Maki at patrick_maki@displaysearch.com or +1.512.687.1511.

Much of the data in the quarterly report will be brought to life at the [2008 US TV Supply Chain Conference](#). The conference brings together the entire TV supply chain, including retailers, TV brands, panel suppliers, TV electronics suppliers, other component suppliers and financial analysts, providing an unequalled opportunity to discuss TV supply chain trends, including efficiency improvements, best-known methods to increase margins, opportunities for profits and a view of the future.

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