

Sony Rises to Top of North America LCD TV Shipments for First Time

Austin, Texas, February 6, 2008—Sony climbed four spots in Q4'07 to reach #1 in LCD TV shipments for the first time with a boost in share from 9.7% to 12.8% on 83% Q/Q sequential growth, the strongest among the top five brands. Sony was the leading brand at 40-44", 45-49" and 50-54" according to preliminary findings from DisplaySearch's latest [Quarterly Global TV Shipment and Forecast Report](#). Sony's strong growth can be attributed to

- Strategic alignment with national big box retailers who focused on 40"+ screen sizes and 1080p resolutions during the 2007 holiday selling season
- Greater focus on North America, which accounted for 29.5% of global LCD TV shipments for Sony

Table 1: Preliminary Q3'07 – Q4'07 North American LCD TV Unit Share and Growth

Rank	Brand	Q3'07 Unit Share	Q4'07 Unit Share	Q/Q Growth	Y/Y Growth
1	Sony	9.7%	12.8%	83%	87%
2	Samsung	10.7%	12.3%	57%	95%
3	Vizio	10.9%	10.7%	35%	250%
4	Sharp	11.3%	8.4%	2%	56%
5	Polaroid	7.6%	8.1%	46%	61%
	Other	49.7%	47.7%	32%	40%
	Total	100.0%	100.0%	38%	64%

Other LCD TV highlights include

- Samsung moved up to #2 at 12.3%, just half a percent behind Sony as both brands exceeded a million units shipped during the quarter. Samsung was #2 behind Sony at 46"/47" and 52", ahead of Sharp in each case.
- Vizio dropped from #2 to #3, though their unit share was nearly unchanged at 10.7% despite having the strongest annual growth of any top five during Q4'07 brand at 250% Y/Y. Vizio also led at 37", shipping twice as many as #2 LG.
- Sharp fell from #1 to #4 as their share fell almost 3 points to 8.4%. Sharp's Q/Q sell-in growth was just 2% with Y/Y volume rising 56%.
- Preliminary totals for LCD TVs rose 38% Q/Q and 64% Y/Y to a new record high of 9.1M units as TV brands incorporate monitor panels in TV products to alleviate TV panel supply tightness and LCD continues to capture share at 42" and 50" from PDP, which in turn is grabbing share from RPTV technologies above 50".

In plasma TVs, Panasonic continued to lead, as shown in Table 2. Panasonic earned a 38.5% share on 81% Q/Q growth. However, on a Y/Y basis, Panasonic's volume was up only 27% due to a strong comparison period. Though there was Y/Y growth among four of the top five brands, several brands that support both flat panel TV technologies have shifted emphasis to LCD, causing the overall plasma TV business to rise only 6% Y/Y in Q4'07 to 1.2M units. Other highlights include

- Samsung gained about a point of share to over 20%, remaining #2 on 46% Q/Q and 34% Y/Y growth.
- LGE continued as the #3 brand, ahead of Hitachi, with a slight increase in unit share to 13.7%. LGE reintroduced 32" to the NA market during Q4'07; the last time it had been shipped was in Q1'05.
- Panasonic led at 42" with more twice the volume of any other brand, capitalizing on the only 1080p models in the segment. Panasonic also led at 50" and 55-58". Pioneer led in 60"+ volume.

Table 2: Preliminary Q3'07 – Q4'07 North American Plasma TV Unit Share and Growth

Rank	Brand	Q3'07 Share	Q4'07 Share	Q/Q Growth	Y/Y Growth
1	Panasonic	29.4%	38.5%	81%	27%
2	Samsung	19.4%	20.4%	46%	34%
3	LGE	13.4%	13.7%	41%	32%
4	Hitachi	9.5%	8.7%	27%	50%
5	Philips	7.2%	6.0%	15%	-38%
	Other	21.1%	12.7%	-16%	-45%
	Total	100.0%	100.0%	38%	6%

Based on both LCD and plasma volumes, the total flat panel TV rankings are shown in Table 3. As indicated, Samsung remained the top combined flat panel TV brand, gaining more than a point of share to 13.1% with share growth in each technology. Sony had the strongest Q/Q growth, climbing a spot to #2 as Vizio slipped to #3, despite triple-digit Y/Y growth.

Table 3: Preliminary Q3'07 – Q4'07 North American Flat Panel TV Unit Share and Growth

Rank	Brand	Q3'07 Share	Q4'07 Share	Q/Q Growth	Y/Y Growth
1	Samsung	11.8%	13.1%	55%	80%
2	Sony	8.5%	11.2%	83%	87%
3	Vizio	10.2%	10.0%	37%	221%
4	LGE	6.8%	7.5%	53%	98%
5	Sharp	9.9%	7.3%	2%	56%
	Other	52.8%	50.8%	34%	29%
	Total	100.0%	100.0%	39%	56%

Starting with the Q1'08 issue, DisplaySearch's highly popular [Quarterly Global TV Shipment and Forecast Report](#) now offers improved revenue share calculations that reflect each brand's individual weighted average selling price by technology, size and resolution rather than industry averages.

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 Arie Braun at (512) 687-1505 or arie@displaysearch.com.

See the #1 North America LCD and Plasma TV brands speak at DisplaySearch's US FPD Conference to be held March 10-13 in San Diego, California. To view the full agenda and register, visit www.displaysearch.com/usfpd2008.

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