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# **Global TFT-LCD Equipment Industry Report, 2009**

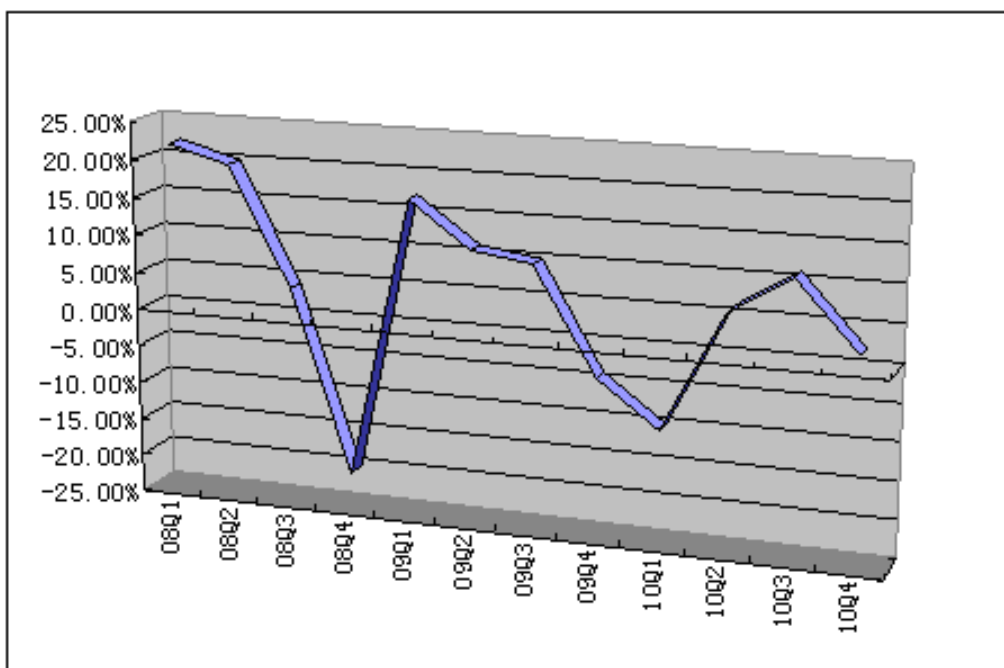
Sep/2010

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## 2. Large-sized TFT-LCD Industry

### 2.5 Status Quo of Large-sized TFT-LCD Industry

**Growth Rate of Global Large-sized TFT-LCD Output Value, Q1 2008-Q4 2010**

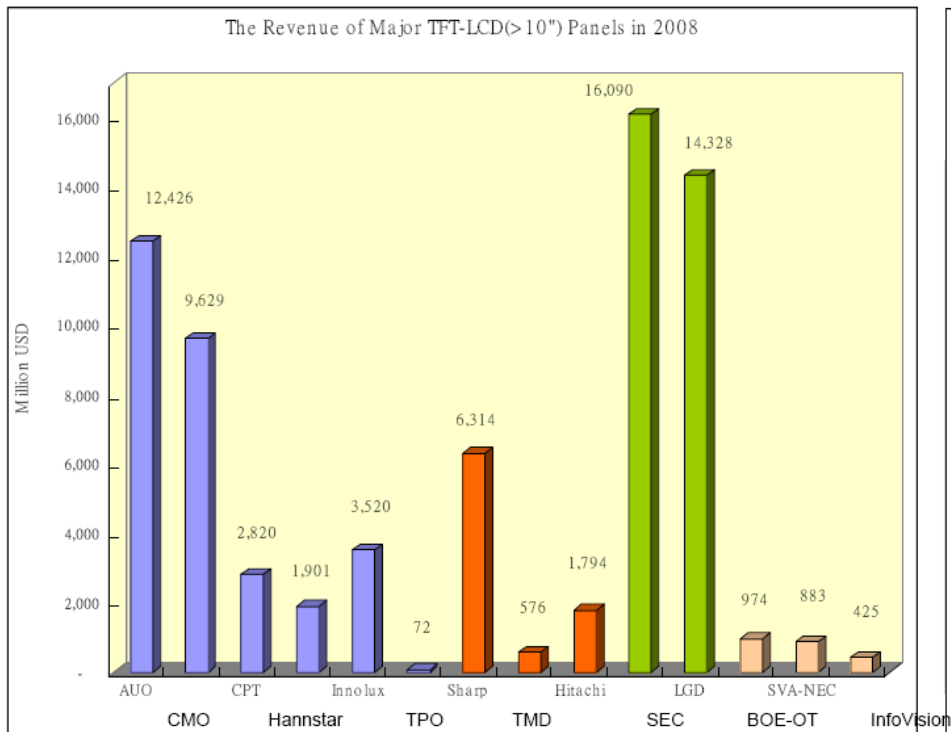


In Q1 2009, supported by LCD TV, the global TFT-LCD market began to rebound. The economy in Europe and America experienced recession, but consumers did not reduce the consumption till the late period of recession. Meanwhile, the promotion of manufacturers, won depreciation and popularity of LCD TV made European and American markets were stable. Driven by China and other emerging countries, European and American markets rebounded significantly. However, Japanese companies felt scared when recession arose, so they reduced production greatly, leading to short supply.

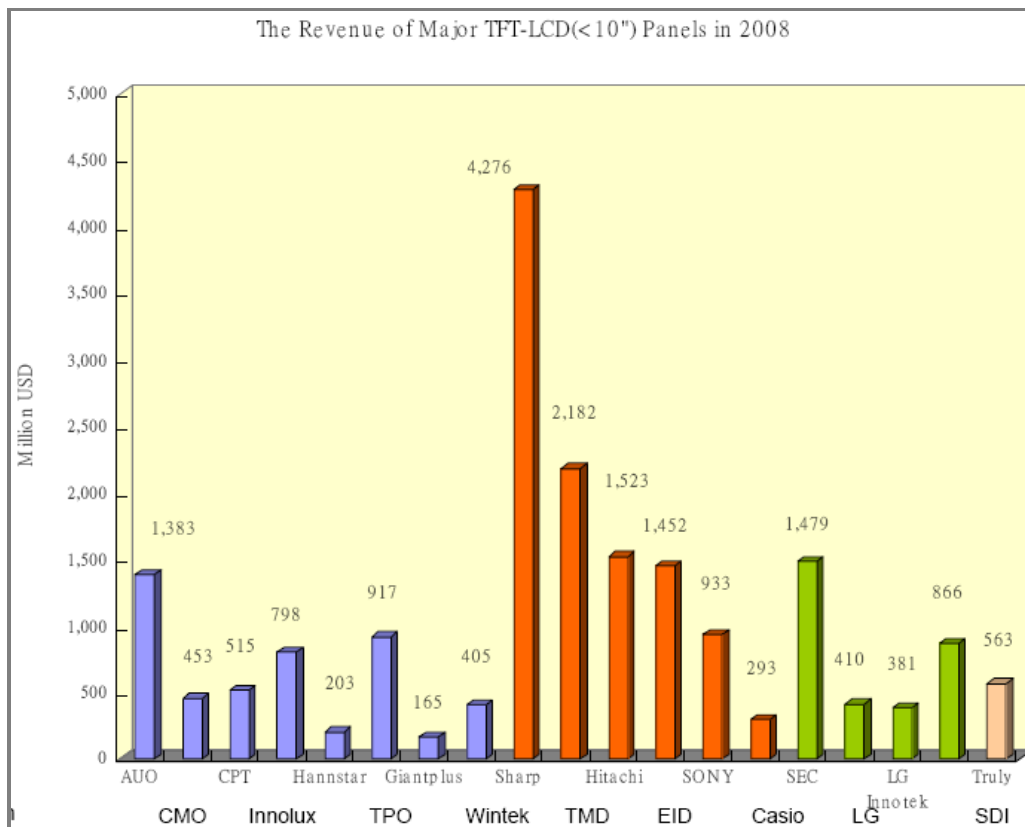
Although the market rebounded strongly, but still lacked powerful support, especially the force from emerging countries, such as China. The recovery of property market will boost consumption at first, home appliance sales volume rises up with new house sales volume; then, consumers will wait and see, so that new house sales volume falls, and home appliance sales volume declines. The unemployment rate is still climbing in Europe and America, the recession has not ended; when consumers aware of this, they will certainly cut down expenditure.

From Q1 2005 to Q4 2010, it seems that TFT-LCD industry has been fluctuating more intensively. But it is not true. The global economy experienced the most significant recession since the Great Depression in 1929. TFT-LCD industry locates in the upstream of consumer electronics and IT industry, which follow the trends of the global economy. Despite external factors, TFT-LCD industry fluctuates slightly, particularly it declines less. This is because LCD TV develops rapidly, IT industry is stable, and laptop grows strongly. Before 2000, 80% of TFT-LCD was used in notebook computers, TFT-LCD industry was highly dependent on notebook computer industry, so TFT-LCD industry fluctuates a lot. In the future, as LCD TV, netbook and LED laptop market enters the mature stage, TFT- LCD industry will not fluctuate greatly.

**Revenue Rank of Global Top 14 Large-sized TFT-LCD Manufacturers, 2008**



**Revenue Rank of Global Top 19 Medium- and Small-sized TFT-LCD Manufacturers, 2008**

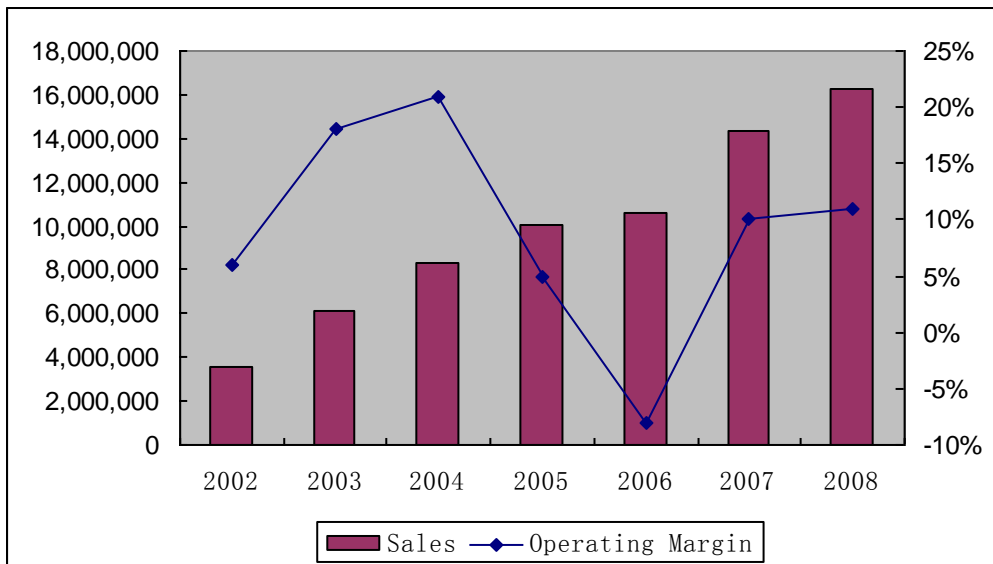


### 3. TFT-LCD Panel Manufacturers

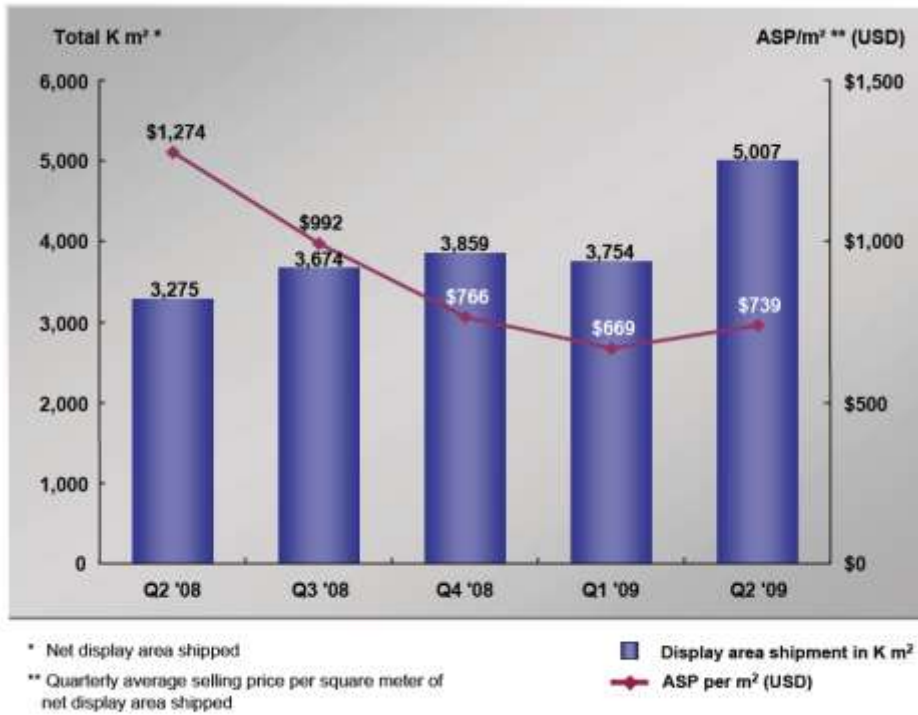
#### 3.2 LG Display

LG Display was formerly known as LG Philips, but after Philips quitted, LG Philips changed its name to be LG Display.

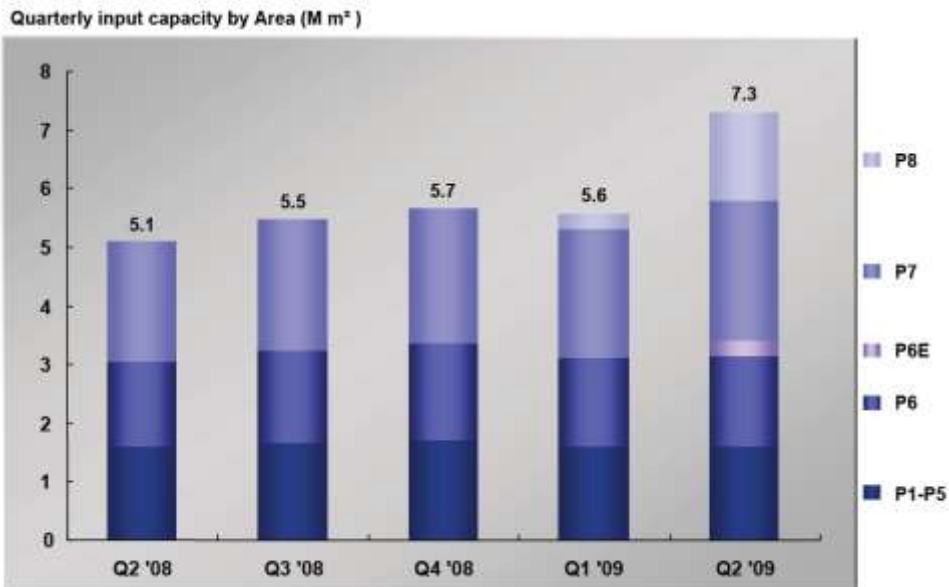
**LG Display Revenue and Operation Profit, 2002-2008**



**LG Display Shipment and Average Price, 2008Q2-2009Q2**



**LG Display Output Capacity by Production Line, 2008Q2-2009Q2**



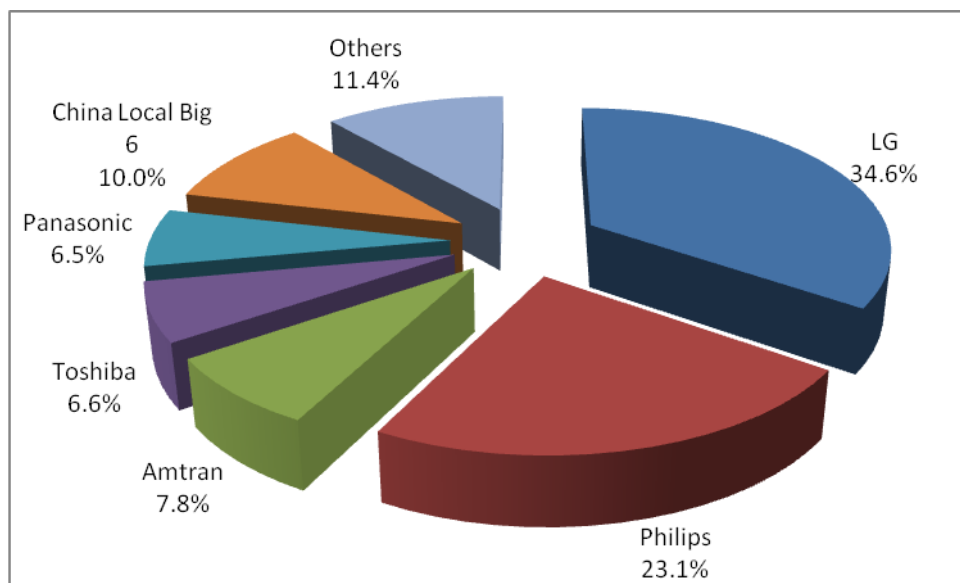
Source: Company financials

**LG Display Distribution by Production Line**



LG Display has two bases in China, respectively in Nanjing and Guangzhou.

**LG Display Distribution by TV Panel Customer**



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