Global and China FPTV Industry Report, 2008-2009

Over 95% DTVs are FPTVs, therefore this research including the DTV.

The shipment of FPTV in 2008 was 124 million, of which, the LCD TV shipment was 109 million, and the plasma TV shipment was 15 million. The industry chain of FPTV includes raw material suppliers, OEMs or ODMs and FPTV manufacturers. Among which, IC suppliers and panel suppliers are the key players.

The ranking of global FPTV manufacturers in terms of shipment is as following: Samsung, Sony, LG, Panasonic, Sharp, Philips, Toshiba, Hitachi, TCL Multimedia and Vizio. Samsung launched a 7th-generation panel production line and two 8th-generation panel production lines together with Sony and Sharp, moreover, Samsung also planned to launch a 10th-generation panel production line together with Sony and Sharp, however, the plan is about to delay. Sony only plays a simple role as the investors regarding those corporations mentioned, Sony has a power over financial issues, and the rest are all controlled by Samsung.

LG Display owns a 7th- generation production line and a 8th-generation production line, while Sharp owns a 8th-generation production line. Panasonic, Hitachi and Toshiba jointly own a 6th-generation production line. Besides, Panasonic has the world's largest plasma display panel production line. Philips also owns a few shares of LG Display.

There are three major suppliers of LCD TV panel in Taiwan are AUO, Chimei and CPTF. The production scale of AUO is similar to Chimei, while CPTF has a smaller scale. LCD TV manufacturers often have a couple of panel suppliers in order to avoid the risks. The clients of CPTF including Samsung, LG, Funai, and AOC. Chimei has the strongest client base, including all of the top ten LCD TV manufacturers except Sharp, among which, Samsung and Sony are the most important two clients. The clients of AUO including Samsung, Sony, Philips, and LG. The clients of LG Display are Philips, LG, Panasonic and Toshiba. Sharp also sells some panels to Philips.

In terms of FPTV OEM, about 25% FPTVs are produced by OEM in the world. The proportion may expand to 35-40% with the increasing of cost pressure in the future. All non TV players relies on OEM 100%, including Westinghouse, Lenovo, Tongfang, ViewSonic, Dell, BenQ, etc. 60% is for Philips, the proportion may reach 100% in the future. The proportion of others is: LG (10%, which may expand to 20% in the future), Sony (20%, which may expand 40% in the future), Sharp (10%), and Toshiba (40%). In 2008, the ranking of OEMs in terms of shipment was AOC, Proview, Amtran, Wistron, Funai, Jabil and Kolin.

In terms of IC, MediaTek and Trident were the major suppliers of Samsung in 2007. Trident targets the medium- and low-end market, while MediaTek targets the high-end market. At the end of 2007, Samsung started its self-developed IC for its medium- and high-end products. Though the scale was small, it also had an impact on MediaTek and Trident, especially the sales of Trident declined nearly 50%, and Samsung will further strengthen its independent R&D. Sonly has five IC suppliers, including Broadcom(AMD), NXP, Trident, MediaTek and NEC, of which, Trident and NEC are the majors.

Panasonic and Sharp are both have self-developed IC, while Philips much relies on ST (GENESIS). Toshiba relies on ST and Sharp, and develops high-end products together with Sharp. Although its shipment is small, Hitachi still insists on self-development. Chinese manufacturers rely on Trident in the early stage, but tended to Morningstar considering the cheaper price in the second half of 2006. And Morningstar shared 70% of Chinese market, focusing on the medium- and low-end market. While in the high-end market, the major players are ST and MediaTek.

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How to Buy

Product details	How to Order
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