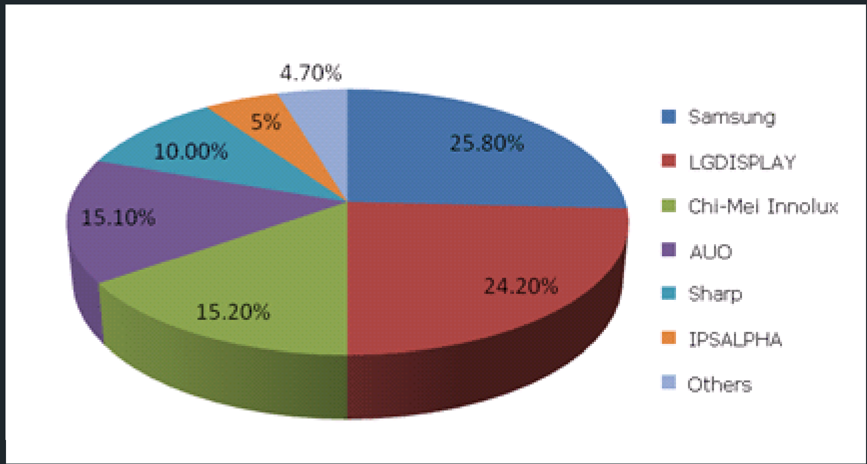
Global and China Flat Panel TV (FPTV) Industry Report, 2009-2010

With a shipment approximate to 161 million units in 2009, the flat-panel television (FPTV) has surpassed the CRT to become the absolute mainstream. The market of the panel, a component accounting for 75% of the cost of FPTV, is still monopolized, with four major manufacturers holding 80% market share. Chimei Innolux backed by Hon Hai Precision Industry should not be underestimated in the future, and AUO is under tremendous pressure.

LCD-TV Panel Market Shares, 2009



The construction of LCD-TV panel lines is booming in Mainland China.

Major Large-size TFT-LCD Panel Production Lines in China, 2004-2011

Company	Location	Technical Origin	Generation	Production Capacity (Ksheet/m)	Time for Mass-Production	Area of Glass Substrates	Status
BOE	Beijing	BOE	5	100	Q1'05	1100x1300	Operating
BOE	Hefei	BOE	6	90	Q4'10	1500x1850	Under Construction
BOE	Beijing	BOE	8	90	Q4'11	2200x2500	Decided
BOE	Hefei	BOE	8	60	Q3'12	2200x2500	Under Discussion
SVA-NEC	Shanghai	NEC	5	90	Sep'04	1100x1300	Operating
IVO	Kunshan	Chimei	5	60	Q3'06	1100x1300	Operating
Century Optoelectronics	Shenzhen	Innolux (Chimei Innolux)	5	60	Q2'09	1200x1300	Operating
Century Optoelectronics	Chengdu	CMI	8	60	Q2'12	2200x2500	Under Discussion
Long Fei	Kunshan	AUO	8	90	Q4'11	2200x2500	Decided
TCL	Shenzhen	CMI	8	60	Q4'11	2200x2500	Decided
LG Display	Guangzhou	LGD	8	60+60	Q2'12	2200x2500	Under Discussion
Samsung	Suzhou	Samsung	7.5	100	Q4'11	1950x2250	Under Discussion
AUO	Suzhou	AUO	7.5	90	Q1'12	1950x2250	Under Discussion
CEC	Nanjing	Sharp	6	60+20	Q1'11	1500x1800	Decided
CEC	Nanjing	Sharp	8	90	Q4'11	2200x2500	Under Discussion

Several 8G lines will be put into production outside Mainland China in 2010, including Chimei Innolux's in the first quarter, Japan IPS ALPHA's in the second quarter, Samsung' s second and LG Display's second in the third quarter. Sharp put its 10G production line into production in October 2009, and Samsung is expected to put its 11G line into production in the fourth quarter of 2012. With all these 8G lines scrambling for the 40-60 inch LCD-TV market, there will undoubtedly be a serious oversupply.

As the world's major manufacturers are turning to outsourcing in respect of FPTV OEM, outsourcing is gaining larger proportions, from which Chimei Innolux will benefit the most. With stable panel support, Chimei Innolux is expected to increase its OEM shipment from 0.90 million units in 2009 to 8 million units and take the world's first place in 2012.

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