

Small-and Medium-Sized LCD Panels Industry Report, 2007-2008



Panels below 10-inch are termed by the market as the medium- and small-sized panels.

Output value of medium- and small-sized panels, stimulated by a big jump in shipment of handsets and the prevalence of color display screens, hit US\$18.3 billion in 2005. The prosperity resulted in the sharp rise in output capacity in 2005, leading directly to a fall in the average selling price of medium- and small-sized panels in 2006. However, the high-end TFT-LCD enjoyed a rising proportion, partially making up for the drops in prices. The output value was ultimately down to US\$17.9 billion in 2006. In 2007, the shipment of high-end LTPSTFT-LCD rose significantly and the output value totaled US\$18.8 billion. In 2008, the average prices of TFT-LCD will decline, since numerous TFT-LCD production lines of manufacturers will be put into operation. Among the numerous TFT-LCD production lines, Wintek owns two 3G TFT-LCD production lines; Truly Semiconductor has one 2G production line; Tianma Microelectronics has one 4.5G production line; PVI has one 2.5G, one 3G and one 3.5G production line respectively, which were all acquired from BOE-HYDIS and Giantplus Technology owns a 3G production line.

Among the above-mentioned the production lines, the ones of Tianma Microelectronic and Truly Semiconductor are newly added, while the others were used originally to produce large-size TFT-LCD panels. The growth in output capacity of medium- and small-sized panels will overtake that of the market demand. The growth rate of the key products, including mobile phone, digital camera, auto navigation and MP3, is expected to rise 10% year on year, lower than 20% growth in output capacity. So, it is natural that the average prices will drop in 2008. It is forecasted that AM OLED will be put on the market massively in 2009, which will raise the demand of medium- and small-size panels, counteracting partial drops in prices.

Statistics and Forecast of Medium- and Small-Sized Panel Market Scale, 2004-2010

	2004	2005	2006	2007	2008	2009	2010
Output Value (US\$ in 100 million)	165	183	179	188	179	180	180

Ranking of World's Top 21 Medium- and Small-sized Panel Manufacturers by Revenue in 2007

(Unit: US\$100 million)

Sharp	33.8
EPSON	17.9
TMD	16.5
Samsung	15.4
Hitachi Display	12.4
Samsung SDI	12.3
AUO	10.8
TPO	10.7
Wintek	9.5
Sony	9.2
Truly	8.0
LG Philips	4.1
LG INNOTEK	3.9
Giantplus	3.9
PVI	3.2
Varitronix	3.2
ChiMei	2.9
Tianma	2.1
RITdisplay	1.1
Other	7

Market Shares of Global Major Medium- and Small-size Panel Producers in 2007

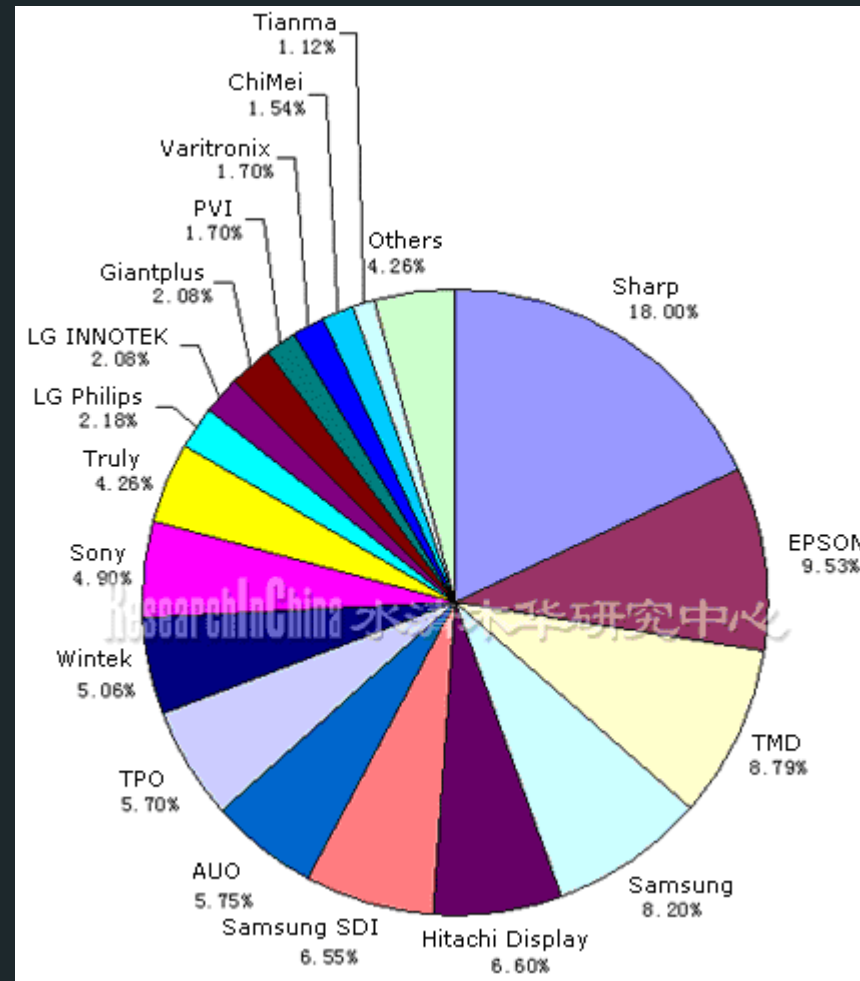


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