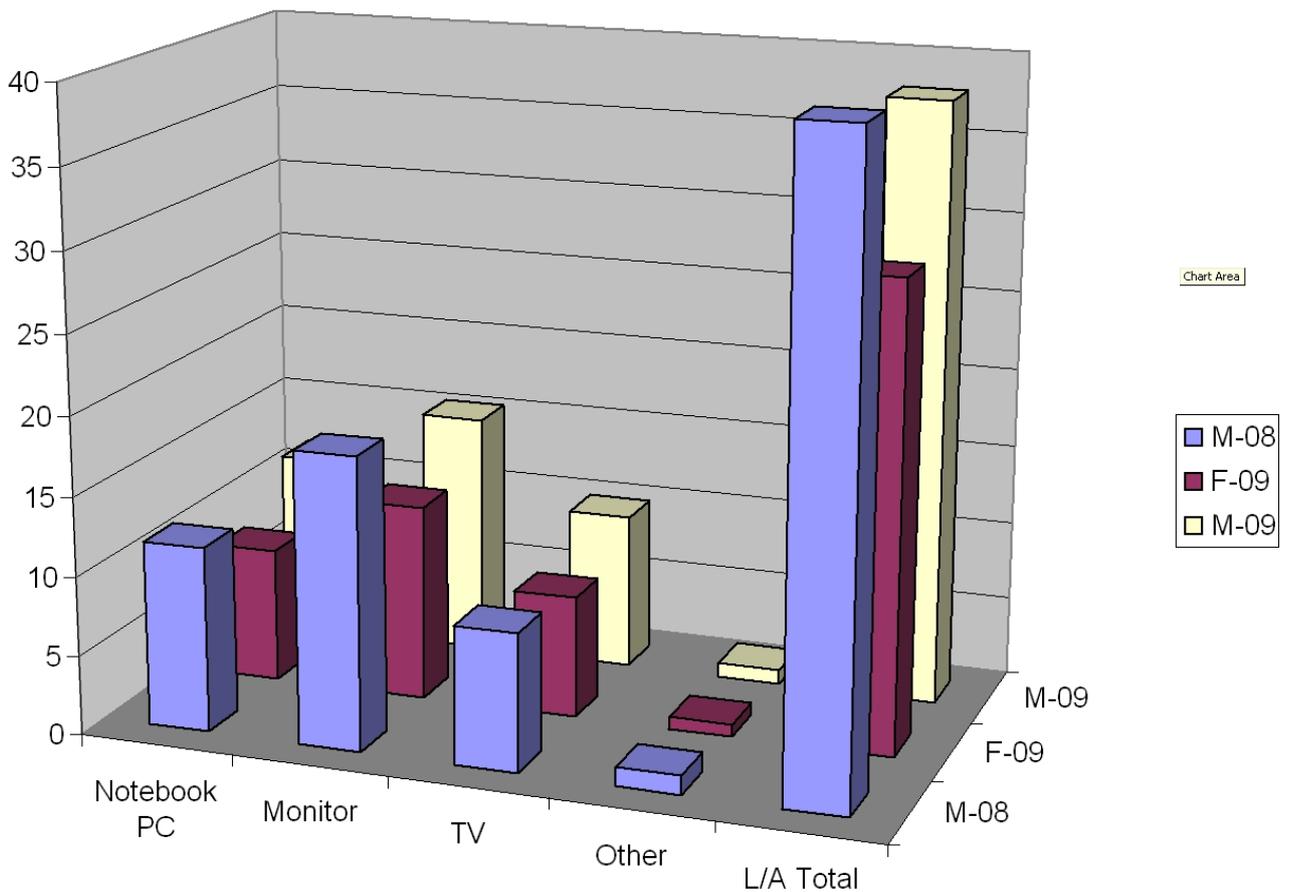


Large-Area TFT LCD Shipments Growing

(DisplaySearch) - March 2009 shipments of large-area TFT LCD panels reached 37.9 million units, showing strong M/M growth of 29%, according to the most recent DisplaySearch Monthly TFT LCD Shipment Database. In addition, large-area TFT LCD revenues reached \$3.9 billion, up 31% M/M. While shipments were down only 5% Y/Y, revenues were 47% lower than March 2008, indicating the magnitude of price declines over the past year. All three major applications—notebook PC, monitor and TV—showed over 20% M/M growth, and total shipments were the highest in six months. February shipment results indicate that the TFT LCD industry had reached the bottom of the cycle, and March’s results show some recovery.

DisplaySearch’s research found that notebook panels had the highest M/M growth at 38%, followed by LCD TV at 30% and LCD monitor at 24%. However, monitor panel shipments are still lower than the same month last year. Notebook panel shipments were flat and TV panels were 14% higher than March 2008. This chart shows monthly shipments by application.



In addition to large-area TFT LCDs, the Monthly TFT LCD Shipment Database also tracks 5.0” to 10.2” mini-note (netbook) panel shipments. Mini-note PC panel shipments were 2.7 million in March 2009, up 79% M/M; HannStar continued to be

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the leader in mini-note panel shipments in March. The Premium Version of the Monthly TFT LCD Shipment Database includes shipment data by suppliers for each application and screen size.

For the notebook PC application, shipments of 16:9 panels reached 2.8 million, a 24% share of the 11.6 million notebook panels shipped, up from 17% in February. In monitors, 16:9 panels reached 4.3 million units, a 28% share of the 15.4 million monitor panels shipped, up from 26% in February. Meanwhile, 32" TV panel shipments reached 4 million units in March, which is the highest monthly volume ever.

According to David Hsieh, Vice President of DisplaySearch, "March results are encouraging for panel makers as they reflect a good recovery in demand." Looking forward, Hsieh added, "Considering the current end-market demand and the low panel inventories, we expect that shipments will continue to grow in Q2'09, and we forecast that panel makers will reach 80% capacity utilization in Q2'09."

Hsieh concluded, "We previously predicted that March would show double-digit growth over February, as panel makers have been increasing capacity utilization, and these results bear out our forecast. However, the key challenge for panel makers is to evaluate the supply/demand balance, which will be determined by the amount of production increase and by whether the growth in demand is sustained in Q2'09."

For information on the DisplaySearch Monthly TFT LCD Shipment Database, contact Carl Holec at +1.512.687.1505 or info@displaysearch.com [1].

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