3D LCD TV Panel Shipments Grow 104% in Q1’11, DisplaySearch Reports

General Electric

SANTA CLARA, Calif., May 31, 2011—According to the latest *Quarterly Large Area TFT LCD Shipment Report* [1] *–Advanced LED+3D*, 3D LCD TV panel shipments increased to 1.9 million units in Q1’11, jumping 104% Q/Q. This growth represents a 3.9% penetration among all LCD TV panels shipped. In addition, panel manufacturers are aggressively working to further increase 3D TV panel penetration in 2011, targeting 16.8% penetration in Q4’11, and 12.3% for 2011.

Table 1: LCD TV Panel 2D/3D Shipment Share*

	Q4’10	Q1’11	Q2’11	Q3’11	Q4’11	Q1’12
3D	1.6%	3.9%	10%	15.2%	16.8%	20.9%
2D	98.4%	96.1%	90.0%	84.8%	83.2%	79.1%

**Q1’11 based on actual results, while Q2’11-Q1’12 forecast is based on the aggregation of worldwide panel makers’ targets*

Source: DisplaySearch *Quarterly Large Area TFT LCD Shipment Report* [1] *–Advanced LED+3D*

“LCD TV panel makers are leveraging 3D as an important feature to rejuvenate TV market demand, in the hope that 3D provides a new viewing experience for consumers,” noted David Hsieh, Vice President of the Greater China Market for DisplaySearch. “The addition of 3D is attractive to panel makers because the price premium can help them increase average selling prices. Of course, there are many challenges for the industry in promoting 3D LCD TVs to end users, such as inadequate 3D content, the presence of flicker or crosstalk that can cause dizziness, price, uncomfortable glasses, and confusion about different 3D technologies.”

LCD panel makers have aggressive plans to expand 3D LCD TV panel shipments this year, as they believe 2011 will be the year that is 3DTV’s potential is realized. In Q1’11, shutter glass type 3D TV panel shipments reached more than 1M units, while pattern retarder type 3D TV panels followed closely behind with approximately 880K units shipped.

DisplaySearch analysis in the *Quarterly Large Area TFT LCD Shipment Report* [1] *–Advanced LED+3D* showed that LCD TV panel makers are working on the following approaches to stimulate 3D TV demand:

3D Price Premium Reductions

For the past several months, panel makers have continuously guided 3D panel price premiums downward. The 3D premium in 240 Hz panels for use with shutter glasses has been reduced from over $50 last year to $25 this year. On the other hand, pattern retarder technology is considered to have higher cost premiums than high frame rate panels due to the difficulties in producing 3D polarizing films. Because of this, some panel makers have introduced pattern retarder 3D panels with CCFL backlights, trading the LED backlight premium for the 3D premium. This approach has had some success in the China market.

3D Viewing Experience

Panel makers are leveraging new technologies to improve the 3D viewing experience, including the pattern retarder method to reduce flicker, or shutter glasses to enhance the 240 Hz driving frequency and reduce cross talk.

3D Glasses

Manufacturers have improved 3D glasses, including the development of cheaper, more user-friendly, fashionable and comfortable glasses. Some have also developed universal glasses to achieve compatibility.

Emphasis on 2D Performance

Since the amount of time consumers spend watching 2D content will exceed that of 3D on a 3D-ready TV, it is important to not sacrifice 2D quality, including full HD picture quality and high brightness. Some panel makers have developed high aperture pixel technology to improve vivid full HD picture quality, as well as high contrast panel technology to realize real black, even in low gray scales.

The Advanced LED+3D version of the *Quarterly Large Area TFT LCD Shipment Report* [1] covers the entire range of large-area panels shipped worldwide and by region, with LED-backlit and 3D panels featured. With 100% coverage of panel makers and authored by industry experts, the *Quarterly Large Area TFT LCD Shipment Report* [1] analyzes historical shipments and forecasts projections to provide some of the most detailed information and insights available. The report is delivered in Excel pivot tables, flex spreadsheets and a PowerPoint analysis. For more information, contact Charles Camaroto at 1.888.436.7673 or 1.516.625.2452, e-mail contact@displaysearch.com or contact your regional DisplaySearch office in China, Japan, Korea or Taiwan.

SOURCE [2]

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