3D LCD TV Panels Increase by 124% Q/Q in Q2'11

General Electric

3D Penetration in 40 and Larger Panels Reaches 21.7%

SANTA CLARA, Calif., August 30, 2011 Shipments of 3D-capable large-area TFT LCD panels increased to 5.2 million units in Q2, growing by 124% Q/Q. Shipments of 3D panels were primarily for LCD TVs, reaching 4.9 million units in Q211, 118% Q/Q growth, and pushing the 3D penetration in LCD TV panels from 4.5% in Q111 to 9.3% in Q211. According to the DisplaySearch Quarterly Large-Area TFT LCD Shipment Report *[1]*, panel makers are targeting 53% growth in 3D LCD TV panel shipments for Q3 as both shutter glass and pattern retarder technologies are maturing and costs continue to fall.

The LCD TV panel industry has been in oversupply for more than a year, and panel makers are motivated to develop new features like LED and 3D to increase value. Although there are still doubts about whether the market is ready for 3D, 3D penetration is increasing due to falling prices and the ability to produce panels. noted David Hsieh [2], Vice President, Greater China Market, DisplaySearch [3]. 3D is not only for high-end products; we are starting to see panel makers develop cost-effective 3D, such as 60 Hz refresh rate with signal simulation or lower frequency with blinking backlight units, which are targeted at affordability and will be critical in encouraging 3D adoption.

In addition to TV, 3D monitor panel shipments are growing rapidly, from less than 80,000 units in Q111 to more than 250,000 in Q211, thanks to adoption in gaming and other special application monitors. The mainstream 3D technology currently used in desktop monitors is shutter glass, but pattern retarder and switched cell solutions are emerging rapidly too. Panel makers expect to double shipments in Q311.

Volumes of 3D panels for notebook PCs are still relatively small, with less than 100,000 units shipped in Q211. However, panel makers are promoting shutter glass, pattern retarder, and autostereoscopic solutions to the gamer and entertainment-focused notebook users. Shipments are expected to grow by 126% in Q311.

For LCD TVs, larger panel sizes are seeing faster penetration of 3D, as the benefits are clearer. In 40 and larger LCD TV panel shipments, 3D penetration increased from 12.7% in Q111 to 21.7% in Q211. TV panel makers are aiming to reach 28.2% in Q311.

Table 1: 3D Penetration in LCD TV Panels

Size	Q111	Q211	Q311
32	0.6%	2.8%	3.8%
37	7.1%	15.7%	20.8%
40	5.7%	11.5%	13.8%
42	6.5%	15.4%	22.5%
46	26.6%	34.3%	39.5%
47	20.0%	38.5%	52.8%
52	24.9%	44.4%	54.5%
55	32.2%	46.1%	59.7%
60	28.6%	22.6%	36.7%
Total 40 and larger	12.7%	21.7%	28.2%

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

In terms of 3D LCD TV technologies, shutter glass is still dominating the market, with 61% in Q2. However, pattern retarder panels are growing rapidly, with 271% Q/Q growth rate in Q2, compared to 74% Q/Q growth of shutter glass type panels. According to panel makers production plans, pattern retarder panel shipments will be reach those of shutter glass panels in Q311.

The DisplaySearch *Quarterly Large-Area TFT LCD Shipment Report* [1] - *Advanced LED + 3D* covers the entire range of large-area panels shipped worldwide and regionally. The report analyzes historical shipments and forecast projections with 100% coverage of panel makers. Authored by industry experts, this report provides some of the industrys most detailed information and insights. It is delivered in PowerPoint and includes Excel-based data and tables. For more information, please contact Charles Camaroto at 1.888.436.7673 or 1.516.625.2452, or contact@displaysearch.com [4] or contact your regional DisplaySearch office [5] in

China, Japan, Korea or Taiwan.

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SOURCE [13]

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[1] http://www.displaysearch.com/cps/rde/xchg/displaysearch/hs.xsl/quarterly_large_area_tft_lcd_shipment_report.asp
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