Top Five TFT LCD Makers to Produce 89.2% of Global Large-Area TFT LCD by Area in 2009, Up from 74.8% in 2008

DisplaySearch's latest Quarterly Large-Area Production Strategy Report provides details on 10"+ TFT LCD glass substrates input and panel production output by size, by aspect ratio, by panel suppliers, by application, by fab generation and by different timeframes, with a rolling four quarters forecast.

Austin, TX (Vocus) June 19, 2009 -- Production of TFT LCD panels is continuously evolving, as different panels of different sizes and applications are made on the most appropriate generation fabs based on utilization and cost efficiency. In unit terms, 34.3% of large-area (10"+) TFT LCD panels were made on Gen 7 lines in Q1'09, up from 32.5% in Q4'08, according to the latest DisplaySearch Quarterly Large-Area Production Strategy Report. DisplaySearch defines Gen 7 to include 1870 × 2200 mm and 1950 × 2250 mm (defined by some as Gen 7.5) substrate sizes.

In Q1'09, 2.3% of all panels were produced on Gen 4 and below, 24.4% on Gen 5, 4.4% on Gen 5.5, 23.9% on Gen 6, 34.3% on Gen 7, and 10.8% on Gen 8, in unit terms (see Table 1). TFT LCD makers are shifting more production to larger fabs. In Q1'10, the share of large-area TFT LCD panels produced on Gen 8 lines (which DisplaySearch defines to include 2160 × 2460 mm and 2200 × 2500 mm sizes) will increase to 19.4%, and 2.8% will be produced on Gen 10 lines.

By application in Q1'09, 77.6% of mini-note PC (netbook) panels and 82.8% of notebook PC panels were made on Gen 5 lines. Because Gen 5 glass substrates are in shortage, the supply of notebook PC panels is expected to be tight in the next few months. 3.4% of notebook panels were made in Gen 6, mainly by LG Display and CPT.

In Q1'09, 43.2% of monitor panels were made on Gen 5 lines, the first time Gen 5 production of monitor panels fell below 50%. DisplaySearch forecasts that in Q4'09, 55.7% of LCD monitor panels will be made in Gen 6 and larger fabs. Interestingly, 4.4% of LCD monitor panels were made on Gen 8 lines in Q1'09, solely due to Samsung 18.5"W and 21.5"W monitor panels.

In terms of TV, Gen 7 has a 47.7% share of TV panels; 29.8% were made on Gen 6 lines and 16.4% on Gen 8. In Q4'09, DisplaySearch forecasts that 28.4% of TV panels will be made on Gen 8 lines, compared to 23.3% on Gen 6.

The DisplaySearch Quarterly Large-Area Production Strategy Report discloses TFT LCD suppliers' production plans, by size, application and generation. The top five TFT LCD makers are expected to account for 89.2% of panel production by area in 2009, a big leap from the 74.8% in 2008. In total, TFT LCD makers are planning to input 105 million square meters of glass substrate for large-area panels in 2009, which represents 15.5% growth from the 90.9 million square meters in 2008.

Samsung is expected to lead TFT LCD production with 28.9 million square meters input in 2009, or 27.5% of the total, followed by LG Display at 25 million square meters, or 23.8% share. AUO is expected to rank third with 17 million square meters and 16.2% share, followed by CMO at 16.8 million square meters and 16.0% share, and Sharp will be fifth with 6 million square meters input and 5.7% share.

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"DisplaySearch expects that TFT LCD production will experience another new wave of changes as Gen 8 production is increasing, and Gen 10 is expected to come on line by Q4’09. Production of smaller size panels in large fabs will increase, as it enables flexibility, and this will change the product mix," said David Hsieh, vice president of DisplaySearch and leader of large-area TFT LCD research. Hsieh continued: "Many monitor and TV panels are produced on the same generation lines, so when TV panels are in shortage, the monitor panel market becomes tight as well. On the other hand, the high production share of the top five large-area TFT LCD panel suppliers indicates that the large-area TFT LCD market is moving to a new level of concentration."

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