

## Display Electronics Topical Report

# Advanced TV Architectures: Stimulus Package to TV Semiconductor

By Randy Lawson, Senior Analyst

### Forecast

#### Frequency, Time Period

- 5-year annual, 2008-2013
- 9-year annual CE and TV semiconductor revenues, 2001-2009

#### Measures

- Flat panel TV shipments by TV technology type (plasma, LCD)
- Internet Enabled TVs, Direct-Lit LED LCD TVs, 2-box TVs
- Regional adoption of flat panel
- Ultra-thin TV penetration
- Semiconductor revenues for advanced architecture TVs
- LED Direct Lit TV outlook and optical semiconductor revenues

#### Regions, Markets

- Worldwide, North America, Japan, Europe, Middle-East/Africa, China, Asia-Pacific, Latin America
- Advanced Flat Panel TVs
- Semiconductors for advanced flat panel TVs

#### Detail Level

- By Advanced TV type (Ultra-thin, LED Direct-Lit, 2-box type, Internet Enabled TV)
- Advanced TV architectures and features

### Applications/Products Covered

- Flat panel TVs (PDP, LCD)
- Consumer Television and TV semiconductor
- Premium TV models and advanced features

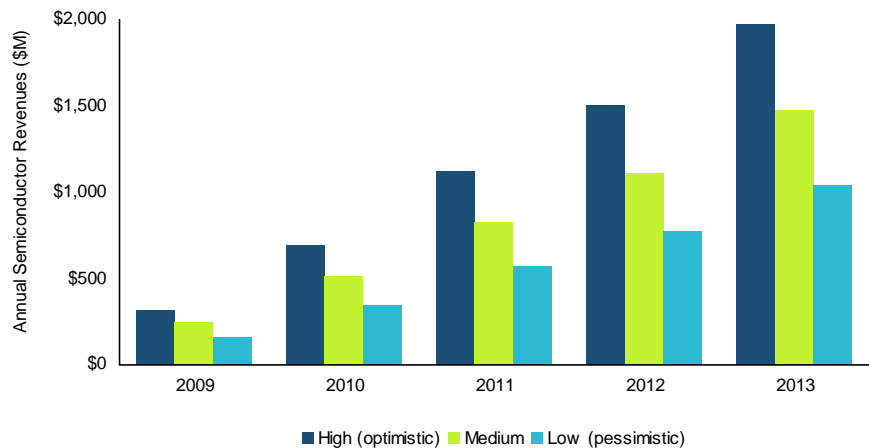
### Technologies Covered

- Ultra thin LCD and Plasma TVs
- LED backlight designs

Technology advancement is nothing new in the Consumer Electronics (CE) market, and specifically within the digital TV CE segment, it has become an expectation for most TV consumers that with each passing year, more functionality will be added, at larger screen sizes, and at lower prices, than the year before. While not quite achieving the same product obsolescence cycle time that trend-setter Apple has set with its umpteen flavors of iPods and laptops, still, leading TV OEMs such as Samsung, LG and Sony are clearly making swift changes and offering a wider array of product options in their flat panel TV portfolio than in past years.

This quarter's Display Electronics topical report examines the impact that advanced new digital TV architectures are having, and will continue to have on the television semiconductor market. Examples of new TV designs and advanced new features are offered and the impact to the underlying electronics is examined in an effort to uncover potential new areas of investment in the semiconductor supply chain.

Potential Semiconductor Revenue Impact from Advanced TV Architectures



### Critical Questions Answered

- What new features and functionality are being added to flat panel TVs?
- How do these new capabilities impact the outlook for semiconductor revenues in the TV space?
- How dominant will direct-lit LED TV models be in the LCD TV market in the next 4 years?
- Can revenue growth continue in the TV semiconductor market in light of the trend toward SoC?
- How does the trend ultra-thin TV impact the TV semiconductor market?
- What is the outlook for ultra-thin and 2-box architecture LCD and Plasma TVs?

### Who Should Read This?

- DTV semiconductor manufacturers
  - Marketing
  - Market intelligence
  - Sales
  - Product definition & systems engineers
- TV OEM & ODM manufacturers
  - Marketing
  - Procurement
  - Product definition & systems engineers
  - Financial
  - Product definition & system engineers

**Lead Analyst****Randy Lawson, Senior Analyst**

Randy comes to iSuppli with extensive industry experience in semiconductor design and applications for consumer electronics and DTV systems. He spent over 15 years with Texas Instruments in various engineering design, product definition and management roles. He began his career in display electronics design, afterwards moving to PC and CE connectivity applications and technical marketing. He has also been involved in both chip level and DTV systems design, helping lead teams that developed some of the first 1394 devices that supported DTCP content protection and high speed networking applications. Randy worked as a systems engineer on the recent Slim DLP program focused on both China and U.S. markets. His most recent role was as an engineering Program Manager with Texas Instruments DLP TV group.

Randy is an alumni of the University of Tennessee and holds a Bachelor of Science in Electrical Engineering.

**Table of Contents**

- Introduction
- Executive Summary
- Key Findings and Implications
- Advanced TV Architectures – An Abundance of Options
  - Depth Down, Units Up: Advanced architecture TVs expand
  - TV Electronics system partitioning
- Semiconductor Outlook - Advanced TV Architectures
  - Semiconductor growth prospects from Advanced TV architectures
  - Gauging the Semiconductor Outlook for Advanced Architecture TVs
- Appendix A: Key Assumptions
- Appendix B: Definitions (Products, Applications, Regions)
- Appendix C: Research Methodology

**Figures**

- Advanced Architecture TVs, Example A
- Advanced Architecture TVs, Example B
- Advanced TV Architectures Growth in Flat Panel TV Market, 2009-2013
- Ultra-thin & Two-box architecture Advantages
- TV Electronics Partitioning Issues
- Flat Panel TV Units & Semiconductor Revenue Outlook, 2008-2013
- Total TV and Flat Panel TV Semiconductor Revenue Outlook, 2009-2013
- Ultra-thin Form Factor, TV Semiconductor Impact
- Two-box Architecture, TV Semiconductor Impact
- LED Backlit LCD TV, TV Semiconductor Impact
- Internet Enabled TV, TV Semiconductor Impact
- Potential Semi Revenue from Advanced TV Architectures, 2009-2013

**Tables**

- Advanced TV features, Electronics Impact
- TV Semiconductor Growth Rate - Historical View
- Key Assumptions List