

## Global LCD Supply/Demand Market Tracker

## Large-LCD Market Faced Worst Oversupply in Years

By Sweta Dash, Director

**Forecast****Frequency, Time Period**

- Quarterly update
- One year quarterly historical
- 8 quarters + 3 years forecast

**Measures**

- Worldwide supply and demand of TFT-LCDs
- Estimate and forecast of production of TFT-LCD fabs by region and substrate size (input sheets and utilization rates)
- Supply/demand analysis by area, application and by size (notebook, monitor and TV)
- Panel suppliers' production shares

**Regions, Markets**

- Analysis of major TFT-LCD production regions (Taiwan, Korea, Japan, China, India)

**Details**

- Demand forecast for notebook computers, desktop monitors, TV
- Production forecast by panel size and application (notebook, monitor, TV)
- Supply/demand forecast for notebook, monitor and TV by panel size
- List of models by applications and by size with detail specifications
- Panel capacity by generations (3rd, 4th, 5th, 6th, 7th, 8<sup>th</sup>, 10th and others)

**Technologies Covered**

- Active matrix TFT-LCD above 9 inch diagonal

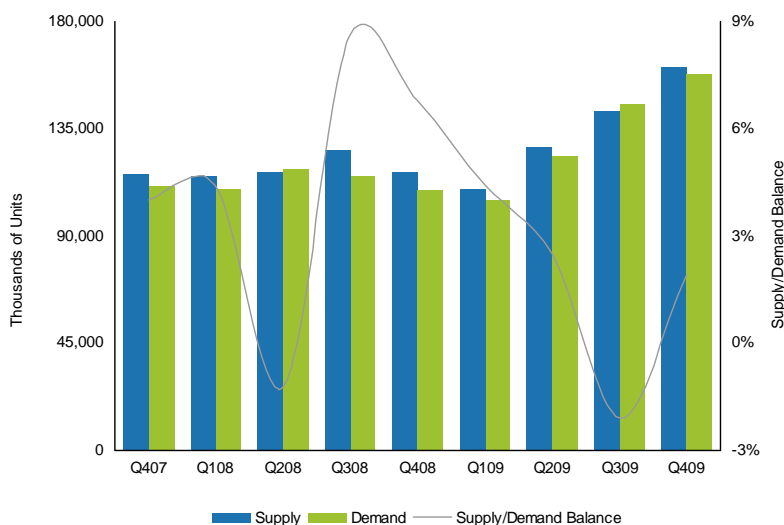
**Supply Side Analysis Factors**

- Raw sheet capacity (estimation of actual running rate rather than the announced figure) in units per month
- Maximum number of displays by substrate size (efficient size)

**Quarterly Demand Side Forecast Inputs**

- Desktop monitors
- Notebook computers
- LCD TV
- Others (Medical, Industrial, Financial)

This report series provides timely data on actual production of large TFT-LCD (thin-film transistor liquid crystal display) panels by applications and by size for major suppliers worldwide. Each quarterly publication compares the data on planned production of large size TFT-LCDs with demand forecasts to give an overview of current supply-demand conditions and future outlook. In this report, large TFT-LCD panels are defined as panels 10 inches and larger in diagonal measurement. The database accompanying each report includes a top-level forecast of the supply/demand balance spanning eight quarters plus 3 years forecast, and a list of large TFT-LCD panels available in the market by major suppliers with panel specs and estimated production of each supplier in the current and preceding quarter. Also included is a fab list for each company by region, by fab location, by generation, by glass size and by input sheet capacity. Specific supply/demand balance estimation and forecast is provided by application (TV, Notebook and Monitor) and panel size.

**Large LCD Supply/Demand Balance, Q407 to Q409****Critical Questions Answered**

- What is the near-term supply/demand balance outlook for large size TFT-LCDs by application and panel size?
- How will change in the demand forecast and supply expansion plan impact supply/demand balance?
- What is the current and future large size TFT-LCD panel capacity, utilization rates by company, by fab size, by region and by area?
- What are the unit production market shares of panel supplier by applications, by region and by fab generation?
- Which panel supplier is gaining market shares and who is losing?

**Who Should Read This?**

- Brand Manufacturers/OEM/ODM for TVs/Monitors/Notebooks
  - Product planning managers for system sales
  - Procurement managers for LCD components
- LCD Panel Suppliers
  - Product marketing/strategic planning managers for LCD panels
- LCD Component Suppliers
- Manufacturers of Competitive Technologies
  - Plasma, Rear Projection, CRT and OLED
- Investment Community
  - Fund managers / investors / analysts with interest in display companies

**Lead Analyst****Sweta Dash, Director**

Sweta is a well-respected industry analyst covering the LCD and projection display industries since early 1990s. She has more than fifteen years of experience tracking electronic display, semiconductor, and computer markets.

At iSuppli, Sweta is the research director and lead analyst for LCD and projection display market reports and services. Her scope of research includes data analysis, market forecasting, and predicting future market and technology trends.

Sweta is the author of numerous papers and she has spoken extensively at various industry conferences. She has a Bachelor of Arts degree with honors and Master of Arts degree in Economics from University of Toronto, Canada.

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**Electronic Database**

- Supply/Demand Analysis (Large Size by application)
- Model List (Large Size, detail specification)
- Vendors' Quarterly Production Share (2 Quarters Historical)
- Fab List (Large Size) and summary of input capacity by company
- Regional market shares by units and area
- Area capacity by fab generation and supplier