

## Monthly Market Barometer of the Large TFT-LCD Supply Chain

By Sweta Dash, Director

### Forecast

#### Frequency, Time Period

- Monthly Update
- Three months historical, two quarters forecast

#### Measures

- Supply/demand outlooks
- Inventory levels
- Rate of panel price change

#### Regions, Markets

- Worldwide manufacturers and buyers (North America, Korea, Taiwan, Japan, China and other regions)

### Technologies Covered

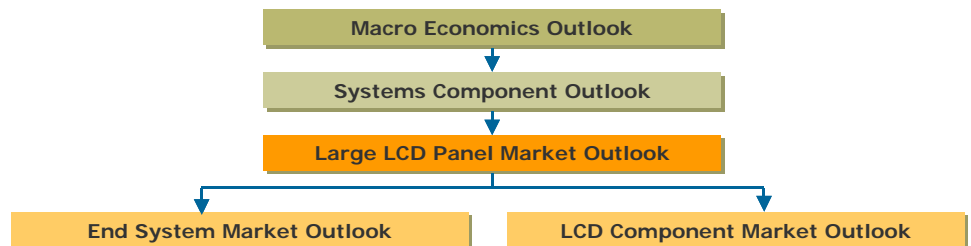
- Large (10-inch and above) TFT-LCD

### Market Segment Tracked Monthly

- Desktop monitors
- Notebook computers
- Television
- LCD components (glass, color filters, polarizer, TAC Film, CCFL and other components)

iSuppli's LCD Health Watch reports the status of and outlook for the supply and demand environment for large TFT-LCD panels on a monthly basis. It provides market condition indicators for the main three segments of the large TFT-LCD value chain: (1) systems (2) panels and (3) components. It also discusses near-term macro-economic conditions that may impact the supply-demand balance.

- Supply Chain Health Summary – Provides analysis of capacity expansion plans, ramp-up schedules, availability of LCD components, and current and projected demand
- Supply/demand outlook – Categorizes the panel supply status for specific applications and components such as: abundant supply, equilibrium, demand exceeding supply or allocation
- Inventory – Specifies the normal inventory level for that time and tracks changes in the inventory level for each specific application of systems and panels, as well as for key components.
- Global Panel Price Trend – Summary monthly price trend data for the key applications
- Global large LCD panel shipments Trend - Monthly large size LCD shipments summary by application (notebook, monitor, TV and others)
- Global large LCD panel suppliers' monthly shipments shares - Monthly large size LCD shipments market shares by application (notebook, monitor, TV and others)



### Critical Questions Answered

- What are the current inventories and lead times at the systems and panel level for each key large TFT-LCD application?
- What is the supply-demand environment for the TFT-LCD component market?
- What type of panels have the greatest risk of shortage or oversupply in the near future?
- When will product availability be impacted? What factors will impact availability?
- What are the global panel price trends?
- What are the large LCD panel shipment trends for the major application markets (notebooks, monitors and TV)?
- What is the unit shipments market shares of major suppliers by application?

### Who Should Use This Tool?

- Brand Manufacturers/OEMs/ODMs for TVs/Monitors/Notebooks
  - Procurement for LCD components
  - Product planning for system sales
- LCD Panel Suppliers
  - Product marketing/strategic planning 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

This report is a collaborative effort by iSuppli display analysts who research component, panel and end systems market globally to give the most updated information about the LCD supply chain. While focusing on the LCD panel market, it has been created by contribution from component and system analysts

**Sweta Dash** 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.

**Rhoda Alexander** is responsible for the Worldwide Monitor Market Tracker, the firm's quarterly report on the worldwide LCD and CRT monitor industry. She leads iSuppli monitor research efforts across a broad array of markets, gathering and analyzing data on price trends, production developments and migrations, market requirements, and economic impacts.

**Riddhi Patel** is responsible for the television and plasma display panel (PDP) analysis. The scope will include creating and implementing industry surveys, market sizing and forecasting, and evaluating the impact of broad market factors on television and PDP demands.

**Stacy Wu** is an LCD analyst and is responsible for LCD research including large area and small and medium size LCDs.

### Electronic Database Includes:

#### Data Selection Criteria

- Macroeconomics outlook
- Large TFT-LCD panel market outlook
- Large LCD monthly panel shipments by application
- Large LCD panel suppliers' monthly shipments shares by application (notebook, monitor and TV)
- TFT-LCD end system market outlook
- TFT-LCD component market outlook