

Liquid Crystal Displays

LCD Health Watch

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

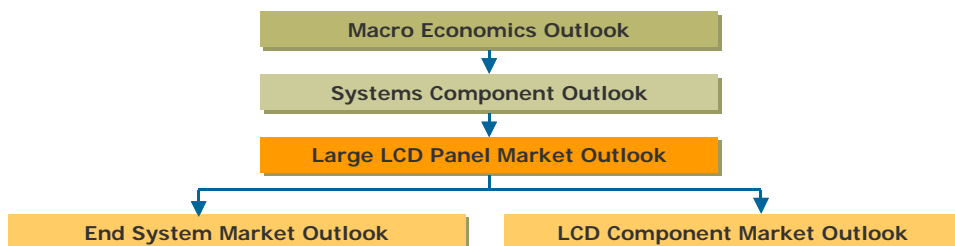
- Large (10-inch and above) TFT-LCD

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)

**Key Issues Addressed:**

- 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?

Applicable To:

- 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 one of the most highly respected analysts in the displays industry. Virtually every leading manufacturer of large LCD panels and systems relies on her research and guidance, as do many of the companies that provide LCD materials, components and equipment. Sweta conducts extensive primary research and utilizes a set of proprietary analytical models, producing exceptionally accurate forecasts of LCD supply, demand, pricing and technology adoption.

Rhoda Alexander has been covering the displays industry for more than 20 years. She is widely regarded as being the leading, independent analyst for desktop and specialty monitors, and her clients include virtually every major company in the monitor value chain. Rhoda's research is comprehensive, encompassing global supply, demand, inventories, and pricing for monitor panels and systems. Her coverage extends beyond volume desktop and workstation monitors into the highly specialized markets for medical, film, broadcast, and air-traffic control.

Riddhi Patel is one of the top analysts in the world covering the television market and value chain. Her clients include the leading TV companies, LCD panel makers, consumer retailers and investment firms. Her extensive, proprietary research includes monthly surveys of thousands of television consumers, enabling Riddhi to provide deep insights into the features, price points, and service offerings that influence TV buying behavior. Riddhi is also the creator of iSuppli's unique BRIC TV Market Tracker, which closely monitors the television value chains in Brazil, Russia, India, and China.

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