

Television Market in India LED, LCD, HD, UHD in 2020

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Abstracts

Television is one of the fastest-growing consumer durable goods in India. The country comprised of more than 200 Mn potential TV households by 2019; however, the market is largely under-penetrated. The fast-changing technological environment, reduction in the cost of production, and rise in consumer affordability has propelled the industry growth over the years. However, the increased use of substitute devices and declining profitability are impeding the growth of the market.

Open cell panel is considered the most crucial component in LED TV manufacturing (open cell panels comprise of 65%-70% of the television production cost). The lowering of import duty on open-cell LED TV panel from 5% to zero has significantly reduced the prices of TV sets and further propelled industry growth.

Further, to promote local manufacturing under the Atmanirbhar Bharat Abhiyan (Self-reliant India mission); the Government of India has restricted the import of fully-built television sets. The move would result in backward integration with increased investment in improved assembly lines and components production.

The flat panel television (LED, LCD, HD, and UHD) market in India was valued at INR 795.71 Bn in 2019 and is expected to reach INR 2,044.29 Bn by 2025, expanding at a compound annual growth rate (CAGR) of ~15.7% during the 2020-2025 period.

Segment insights:

The flat panel television market in India can be segmented into smart TV and non-smart TV. Smart TV sets account for a significant share (of more than 75%) of the overall television market. Foreign players like Xiaomi, OnePlus, and Realme have disrupted the smart TV segment with the launch of its range of budget-friendly products. Domestic players are rapidly reducing prices to battle the fierce industry competition. Xiaomi is a

leader in the smart TV segment with a share of ~29.50%, followed by LG, Samsung, and Sony.

In terms of display size, television sets between 32 inch and 43 inch account for notable sales percentage, since they are affordable to the larger section of the society.

However, the onset of COVID-19, the sale of larger screen sizes (43 inches and above) outperformed the 32 inches TV sets, which was the bread-and-butter of the industry.

Further, the reduction of Goods and Service Tax (GST) rates has truncated the prices of television sets in India.

Impact of COVID-19

Businesses worldwide have suffered immensely due to the COVID-19 pandemic. However, the virus outbreak and the ensuing lockdown have revived the Indian television market after two years of declining sales. As of August 2020, large screen television models (55-inches and above) reported a 30%-40% sales growth as compared to pre-COVID period. Moreover, TV manufacturing companies have witnessed spiked demand for smart televisions that can be directly connected to streaming devices. Amid the crisis and disturbed relations with China, localization is the key to success for the Indian television industry.

Companies covered:

BPL Limited

Intex Technologies (India) Limited

Hitachi India Private Limited

LG Electronics India Private Limited

Panasonic India Private Limited

Philips India Limited

Samsung Electronics India Private Limited

Sony India Private Limited

TCL India

Xiaomi Technology India Private Limited

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