

[In-depth]UHD TV Makers' Market Strategy Analysis(2013-2016)

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Abstracts

SNE Research is expanding its research area and consulting services from the renewable/secondary energy industry to the display industry. SNE Research's first UHD TV report, "UHD TV Market Insight" was published in May 2013. The newly updated UHD TV report, UHD TV Makers' Market Strategy Analysis (2013~2016) reports in-depth study on panel & set technology trend and producers' strategies

On September 26, 2013, SNE Research reported that the LCD UHD TV shipped close to 1.2 M pcs from January to August of 2013 in the panel base. The UHD TV panel shipment penetration accounts as 0.8% (Korea 4.7%, Japan 0.6%, Taiwan 81.4% and China 13.3%) of the total TV panel shipment. Especially, the panel shipment in August has risen to 353K pcs per month. SNE Research foresees that the increase panel shipment trend could result 2.6M units in 2013.

China is a major market for the UHD TV set. Currently, Taiwanese and Chinese producers are entering the UHD TV market in order to increase the market share. So their UHD TVs are tend to be low-end (60Hz) and inexpensive price range focused products; however, Japanese and Korean UHD TV producers will lead the market with the various product line-ups with aggressive price strategies. Given market situation and heated competition, the UHD TV Market will have the new mainstream product line-ups and the standardization of UHD TVs soon.

During the IFA 2013 on September 6~11th in Berlin, Germany, the UHD TV show-cased in large TVs over 55" to 110" was the major news for TV market (LCD: 110" 98" 85" 65" OLED: 77" 55". LGE (77"UHD OLED TV) and SEC (55"UHD OLED TV) demonstrated their latest prototype UHD OLED TV at the IFA 2013. As SNE Research forecasted, the UHD TV market will be entering the TV market sooner than the industry

expected.

SNE Research has been closely monitoring the UHD TV broadcasting systems (Terrestrial, cable, IPTV, satellite TV) in order to research, analyze and forecast UHD TV ecosystem.

This report contains the following key contents:

TV Market History & Detailed Analysis and Forecast on Future TV Market/Recent update of Technology & Product

Details on 4K2K(UHD) & TV Business Strategy/Line Up Analysis of Companies from Korea/ Japan/Taiwan (Set, Panel Maker) based on makers' Q3'13 Roadmap & main trend of 2013 IFA Exhibition

Analysis of Solution for 4K2K(UHD) TV by Technology (LCD, OLED), Application and Company (Set, Panel Maker).

Analysis and Research on 4K2K(UHD) TV (LCD, OLED) Issues.

For the first time in the industry, predictions on future business development were made and in-depth insights have been presented for 3 scenarios.

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About

The introduction of OLED 4K TV by Japanese consumer electronics companies as an act of defense. Sony and Panasonic went through downgrading of credit and a several time of reorganizations of the companies due to its astronomical deficit. After losing its leadership to Korea in the TV market, Japanese brands realize that they cannot be losing market share to Korean brands anymore in TV market.

The FPD industry recognizes that Japanese CE producers lost its competitive edge in pricing long time ago. Japanese CE producers have been suffering from its high Yen currency over decades and its natural disasters like the earthquake in 2011 did not help its economy. Japanese new Prime Minister Shinzo Abe has been emphasizing the revival of Japanese economy and one of his policy is to support business is lowering the Yen so that Japanese companies can compete with overseas companies at competitive pricing.

So we better producers forecast that the year 2013 would for Japanese CE because of its government trying to support businesses by lowering the Yen.

We believe that the lowering Yen would benefit the Japanese TV brands because the TV market is most competitive in pricing. Japanese OLED producers have formed the partnerships among them because Japanese companies realize that a partnership could empowered them in order to compete with Korean OLED producers. For instance, Japan Display Inc. (JDI), which was founded by Japanese government of USD 3M, was formed by Sony, Hitachi, and Toshiba which are in small & medium display business. JDI set its goal as becoming number one brand by winning over Samsung.

Copyright© SNE Research Co., Ltd. All Rights Reserved 34/45 JDI is planning to produce 300ppi small OLED display and a new type of LCD display with an OLED backlight in 2014. In terms of OLED display large application, Sony and Panasonic are conducting R&D in order to finalize establishing a mass production technology in 2013. It is also said that if Sony and Panasonic enables the mass production of OLED displays in large application, the Japanese government could invest and establish an entity so called Japan OLED Display.

If the Japanese producers can deliver mass production of OLED TV, TV market would expect to see dramatic competition.

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