

Display Production and Inventory Tracker

Alex Kang, Senior Analyst

ACTUALS AND FORECAST

Frequency, Time Period

- Monthly update
- One-year result and three-month forecast

Measures

- Design capacity (K sheets) by fab
- Glass input (K sheets) by fab
- Fab utilization rate (%) by fab
- Net supply capacity (K m²) by fab
- Production area (K m²) by fab
- Shipment area (K m²) by applications
- Inventory area (K m²) by panel maker
- Inventory weeks by panel maker

PRODUCT COVERAGE

- LCD TV panels (TV, signage)
- Monitor panels
- Notebook panels (notebook, ultrabook, mini-note)
- Tablet panels
- Other (including other emerging applications, such as industrial, medical, and financial usage)

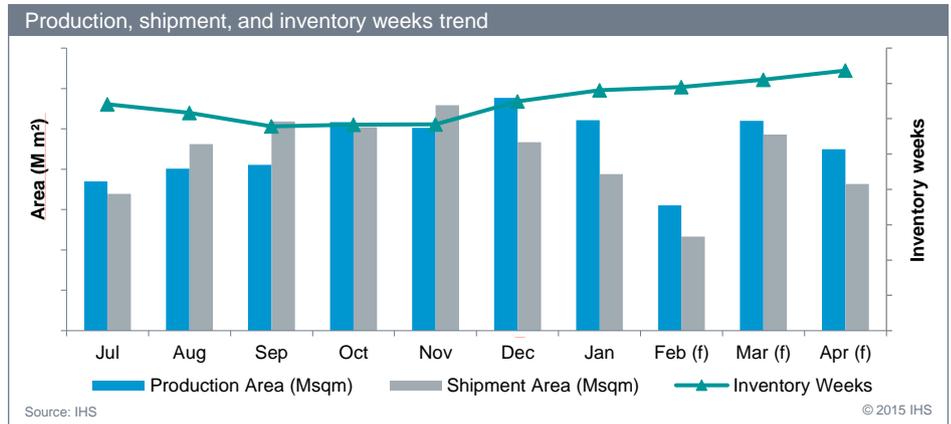
TECHNOLOGY COVERAGE

- a-Si TFT LCD panels

This report updates the status of fab management and panel maker production, shipments, and inventories (PSI). It also provides a monthly forecast for all panel makers for the next three months. The important index for this report is the panel makers' inventory measured in weeks.

The fab management section provides data on monthly design capacity, glass input, and utilization rate by LCD fab. The shipment data section lists the monthly shipments of each LCD panel maker by application. The inventory section provides the status of TV and IT panel inventories for each maker every month.

Important indicators of future price and supply/demand forecasts include whether the supply capacity of panel makers continues to exceed panel demand, panel makers' fab management strategies, and their production and inventory strategies as well



Key Issues Addressed

- What is the production plan of each panel maker?
- What is the utilization and inventory management strategy of each panel maker?
- How many panels is each panel maker shipping? What is their shipment plan for the next three months?
- What is the current inventory level and forecast for panel makers? Are they at risk of excessively piling up inventory or running very low compared to the stable inventory level?
- How will the market be changed by inventory trends in the near future?

Applicable To

Brand manufacturers/OEMs/ODMs for TVs, monitors, notebooks, tablet PCs

- Product planning managers for systems sales
- Procurement managers for LCD components

LCD panel suppliers

- Product marketing and strategic planning managers for LCD panels

LCD component suppliers

Manufacturers of competitive technologies

Investment community

- Fund managers / investors / analysts with interest in display companies

LEAD ANALYST

Alex Kang, Senior Analyst

Alex Kang is responsible for large-area TFT-LCD panel market research at IHS, including manufacturing fab and supply chain management. He is one of the key contacts for LCD research. Alex joined IHS in 2005 and has carried out multiple projects for players in the display industry and government entities. He led numerous projects, including feasibility studies for investments, a marketability forecast for emerging technologies, established a business cluster development strategy, and a long-term LCD market volume and pricing forecast. His experiences have provided him with an extensive network of contacts throughout the Asian LCD panel market and in-depth knowledge of the supply chain.

CONTRIBUTING ANALYSTS

Ricky Park, Director

Linda Lin, Senior Analyst

TECHNOLOGY SOLUTIONS FROM IHS MARKIT

The Technology Group at IHS Markit is the leading source of information, insight and analytics in critical areas that shape today's technology ecosystem—from materials and components, to devices and equipment, to end markets and consumers. Businesses and governments in more than 150 countries around the globe rely on the deep market insight and expert independent analysis of our 300+ industry analysts in technology sectors spanning IT, telecom, media, industrial, automotive, electronics, solar and more.

Table of Contents

Large-area TFT LCD panel fab management

- Design capacity (K sheets)
- Glass input (K sheets)
- Fab utilization rate (%)
- Net supply capacity (K m²)
- Production area (K m²)

Large-area TFT LCD panel shipment data

- Shipment area (K m²)
- Shipment unit (K units)

Large-area TFT LCD panel production, shipment & inventory (PSI) analysis

- Inventory status
 - o Inventory weeks
 - o Accumulated inventory (K m²)
 - o Inventory weeks compared to normal level
- PSI data - Market total
- PSI data - Samsung Display
- PSI data - LG Display
- PSI data - AU Optronics
- PSI data - Innolux Corp
- PSI data - BOE
- PSI data - China Star
- PSI data - Sharp

For more information [ihsmarkit.com/technology](https://www.ihsmarkit.com/technology)

About IHS Markit

IHS Markit (Nasdaq: INFO) is a world leader in critical information, analytics and solutions for the major industries and markets that drive economies worldwide. The company delivers next-generation information, analytics and solutions to customers in business, finance and government, improving their operational efficiency and providing deep insights that lead to well-informed, confident decisions. IHS Markit has more than 50,000 key business and government customers, including 85 percent of the Fortune Global 500 and the world's leading financial institutions. Headquartered in London, IHS Markit is committed to sustainable, profitable growth.