

Quarterly Medium & Large OLED Display Market Track Sample

4Q, 2023

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- 8. Supply and Demand Analysis for TV**

1. Reference Guide

Application Covered

- Automotive
- Notebook
- Monitor
- Tablet PC
- TV
- Etc.

Substrate Covered

- Flexible OLED
- Rigid OLED

Nation Covered

- Korea
- China
- Taiwan
- Japan

Actual and Forecast

- Quarterly update
- History : 3-year, Forecast : 5-year

Unit

- Shipments : M pcs
- Revenue : US\$ millions
- Average Selling Price : US\$
- Display Area : (million m²)

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Medium & Large OLED Display Quarterly Market Track

- 4Q23 Data Tables

- [Quarterly Capacity](#)
- [Quarterly Capacity Glass Area](#)
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- [Supply & Demand for TV](#)

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Data_Quarterly

- Contents

> Capa/month

> Capa/month (1,000 she)

Nation	Company	Fab. Location	Gen	Backplane	OLED Method	Status	Line Status					Possibility	1Q22	2Q22	3Q22	4Q22	1Q23	2Q23	3Q23	4Q23	1Q24	2Q24	3Q24	4Q24	1Q25	2Q25	3Q25	4Q25	1Q26	2Q26	3Q26	4Q26	1Q27	2Q27	3Q27	4Q27
							PO	Install	PP	MP	RU																									
Korea	Samsung Display	Tangjeong A2	5.5	LTPS TFT	RGB OLED	MP	2Q11	1Q12	2Q12	4Q12	-																									
Korea	Samsung Display	Tangjeong A2	5.5	LTPS TFT	RGB OLED	MP	4Q12	3Q13	4Q13	3Q14	-																									
Korea	Samsung Display	Tangjeong A2	6	LTPS TFT	RGB OLED	MP	3Q16	2Q17	3Q17	4Q17	-																									
Korea	Samsung Display	Tangjeong A2	6	LTPS TFT	RGB OLED	MP	2Q17	1Q18	2Q18	3Q18	-																									
Korea	Samsung Display	Tangjeong A3	6	LTPS TFT	RGB OLED	MP	4Q15	3Q16	4Q16	1Q17	-																									
Korea	Samsung Display	Tangjeong A5	8.8	Oxide TFT	RGB tandem OLED	PO	3Q23	3Q24	3Q25	2Q26	-																									
Korea	Samsung Display	Tangjeong Q1	8.5	Oxide TFT	QD OLED	MP	1Q20	3Q20	4Q20	4Q21	-																									
Korea	Samsung Display	Tangjeong Q1	8.5	Oxide TFT	QD OLED	MP	-	-	-	-	4Q22																									
Korea	Samsung Display	Tangjeong Q1	8.5	Oxide TFT	QD OLED	MP	-	-	-	-	3Q23																									
Korea	Samsung Display	Tangjeong Q1	8.5	Oxide TFT	QD OLED	MP	-	-	-	-	2Q24																									
Korea	LG Display	Paju E3	8.5	Oxide TFT	WRGB OLED	MP	4Q10	3Q11	1Q12	1Q13	1Q18																									
Korea	LG Display	Paju E4	8.5	Oxide TFT	WRGB OLED	MP	2Q13	1Q14	2Q14	3Q14	3Q20																									
Korea	LG Display	Paju E4	8.5	Oxide TFT	WRGB OLED	MP	4Q15	3Q16	4Q16	1Q17	3Q20																									
Korea	LG Display	Gumi E5	6	LTPS TFT	RGB OLED	MP	1Q16	4Q16	1Q17	3Q17	-																									
Korea	LG Display	Paju E6	6	LTPS TFT	RGB tandem OLED	PP	4Q21	3Q22	1Q23	1Q24	-																									
Korea	LG Display	Guangzhou 1	8.5	Oxide TFT	WRGB OLED	MP	1Q18	4Q18	1Q19	3Q20	3Q21																									
Korea	LG Display	Guangzhou 2	8.5	Oxide TFT	WRGB OLED	MP	3Q18	2Q19	3Q19	3Q20	3Q21																									
China	BOE	Hefei	8.5	Oxide TFT	WRGB OLED	PP	4Q12	4Q13	2Q14	-	-																									
China	BOE	Chongqing B12	6	LTPS TFT	RGB tandem OLED	Install	3Q21	2Q22	1Q24	2Q24	-																									
China	Visionox	Hefei V3	6	LTPS TFT	RGB tandem OLED	Install	3Q22	2Q23	4Q23	1Q24	-																									

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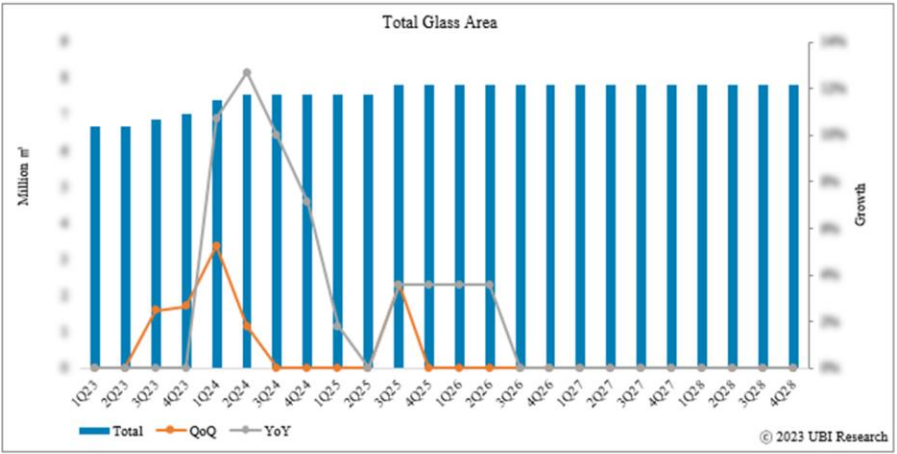


Capacity Chart_Quarterly

- Contents
- > Total Glass Area
- > Glass Area by Company and Ratio
- > Glass Area by TFT Technology and ratio
- > Glass Area by Generation and Ratio
- > Glass Area by Substrate and Ratio
- > Glass Area by Nation and Ratio

> Total Glass Area (million m)

Item	1Q23	2Q23	3Q23	4Q23	1Q24	2Q24	3Q24	4Q24	1Q25	2Q25	3Q25	4Q25	1Q26	2Q26	3Q26	4Q26	1Q27	2Q27	3Q27	4Q27	1Q28	2Q28	3Q28	4Q28
Total	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100
QoQ	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
YoY	0.0%	0.0%	0.0%	0.0%	10.7%	12.7%	10.2%	7.1%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%



> Glass Area by Company (million m) > Glass Area Ratio by Company

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Quarterly ASP Trend

- Contents
> Pivot of quarterly ASP (US\$)

Nation (All) Substrate (All)

Application	Size	US\$																										
		1Q18	2Q18	3Q18	4Q18	1Q19	2Q19	3Q19	4Q19	1Q20	2Q20	3Q20	4Q20	1Q21	2Q21	3Q21	4Q21	1Q22	2Q22	3Q22	4Q22	1Q23	2Q23	3Q23				
Automotive	32.7									380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0		
etc	35	40.0	40.0	40.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0		
Monitor	21.5	270.0	270.0	270.0	270.0	270.0	270.0	270.0	270.0	270.0	270.0	270.0	270.0	270.0	270.0	270.0	270.0	270.0	270.0	270.0	270.0	270.0	270.0	270.0	270.0	270.0		
NB	35									110.0	110.0	110.0	110.0	110.0	110.0	110.0	110.0	110.0	110.0	110.0	110.0	110.0	110.0	110.0	110.0	110.0		
Tablet	10.5	97.0	98.0	98.0	98.0	98.0	98.0	98.0	98.0	98.0	98.0	98.0	98.0	98.0	98.0	98.0	98.0	98.0	98.0	98.0	98.0	98.0	98.0	98.0	98.0	98.0		
TV	42																	340.0	340.0	340.0	340.0	340.0	340.0	340.0	340.0	340.0		
	50	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0		
	60	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0	380.0		
	77	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0	1,000.0		
	80																	1,200.0	1,200.0	1,200.0	1,200.0	1,200.0	1,200.0	1,200.0	1,200.0	1,200.0		
	88																	1,200.0	1,200.0	1,200.0	1,200.0	1,200.0	1,200.0	1,200.0	1,200.0	1,200.0		
	97																	6,200.0	6,200.0	6,200.0	6,200.0	6,200.0	6,200.0	6,200.0	6,200.0	6,200.0		

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Yearly Forecast Shipment

- Contents

> Pivot of forecast shipment (M pcs)

		M pcs					
Company	Application	2023	2024	2025	2026	2027	2028
BOE	Tablet	-	3.5	3.8	3.8	3.4	3.8
LG Display	Automotive	0.6	0.6	0.6	0.7	0.8	0.8
	Tablet	-	4.1	4.1	4.1	4.1	4.1
	TV	4.0	6.1	7.8	8.5	8.2	8.8
Samsung Display	Automotive	0.8	0.8	1.1	1.4	1.7	1.9
	etc	1.8	-	-	-	-	-
	Monitor	0.3	0.4	0.4	0.4	0.4	0.4
	NB	1.0	1.7	1.8	1.8	1.5	1.5
Visionox	Tablet	1.9	1.5	1.5	1.5	1.4	1.5
	TV	0.9	1.2	1.2	1.2	1.2	1.2
Visionox	Tablet	-	0.8	1.1	1.4	1.8	2.4
Total		11.5	24.6	31.5	38.4	46.5	51.8

Yearly Forecast Revenue

- Contents

> Pivot of forecast revenue (US\$ million)

		US\$ Million					
Company	Application	2023	2024	2025	2026	2027	2028
BOE	Tablet	-	121.9	131.8	136.8	128.7	135.4
LG Display	Automotive	109.6	105.3	101.2	106.8	106.8	102.7
	Tablet	-	360.8	347.5	350.1	313.8	307.9
	TV	2,029.0	2,175.7	2,288.5	2,179.7	2,007.3	2,102.9
Samsung Display	Automotive	120.0	118.7	148.1	174.4	140.3	138.4
	etc	90.2	-	-	-	-	-
	Monitor	102.1	112.8	116.7	119.8	105.3	109.0
	NB	107.4	141.3	174.8	124.3	107.5	104.8
Visionox	Tablet	107.8	140.1	148.7	1334.3	1,278.9	1,343.5
	TV	686.0	888.9	825.4	784.2	746.0	707.7
Visionox	Tablet	-	81.8	81.3	100.4	110.0	111.2
Total		4,062.8	4,279.8	4,287.8	3,961.2	3,917.9	4,074.8

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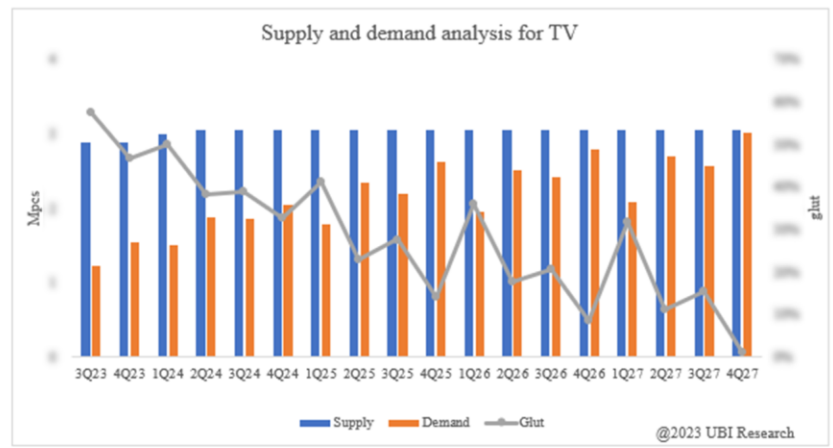
Quarterly Supply and Demand Analysis

Contents

- Supply and Demand Analysis for TV

Supply and Demand Analysis for TV (M pcs)

	3Q23	4Q23	1Q24	2Q24	3Q24	4Q24	1Q25	2Q25	3Q25	4Q25	1Q26	2Q26	3Q26	4Q26	1Q27	2Q27	3Q27	4Q27
Supply	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000
Demand	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500
Glut	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000





Chief Analyst
Dr. Choonghoon YI