

## 2013: A Year for TV Replacements?

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06. 11. 2012

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According to TrendForce WitsView global medium- and large-size LCD TV demand will remain soft in 2012, with shipments reaching 206 million units with "small" 2.7% Y-o-Y growth.

Growth should be more positive in 2013-- the analyst predicts shipments will reach 215m units with 4.4% Y-o-Y growth.

The Korean vendors (Samsung and LG) dominate the 2013 market with 33% share, while Japanese (Sony, Sharp, Toshiba et al) share declines further to 21-22%.

**Table 1. The forecast for global LCD TV brands' shipments in 2013(million units)**

Brand	2012WV(E)	2013 BP	WV(E)	12 M/S	13 M/S	Change %
Samsung	41.0	45.0	43.5	19.9%	20.2%	0.3%
LGE	27.0	30.0	28.5	13.1%	13.3%	0.1%
Sony	15.3	14.5	14.0	7.4%	6.5%	-0.9%
Sharp	8.0	10.0	8.0	3.9%	3.7%	-0.2%
Toshiba	12.4	15.0	13.0	6.0%	6.0%	0.0%
Philips (EU/CH)	5.8	7.5	6.0	2.8%	2.8%	0.0%
Panasonic +Sanyo	10.5	12.5	11.5	5.1%	5.3%	0.3%
Vizio	5.8	7.5	6.0	2.8%	2.8%	0.0%
Funai	6.5	7.5	7.0	3.2%	3.3%	0.1%
Changhong	6.0	7.5	6.5	2.9%	3.0%	0.1%
Haier	4.8	6.0	5.3	2.3%	2.5%	0.1%
Hisense	10.7	12.0	11.5	5.2%	5.3%	0.2%
Konka	7.0	8.5	7.8	3.4%	3.6%	0.2%
Skyworth	8.5	10.0	9.3	4.1%	4.3%	0.2%
TCL	12.0	15.0	13.7	5.8%	6.4%	0.5%
Others	24.7	32.0	23.4	12.0%	10.9%	-1.1%
<b>TTL</b>	<b>206</b>	<b>240.5</b>	<b>215</b>	<b>100%</b>	<b>100%</b>	

Source : WitsView

The analyst also predicts LED LCD TV penetration will "surge"-- from around 70.3% in 2012 to 85-90% in 2013, as customers set to replace their 32-inch LCD TVs to larger, cheaper 40-inch

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models. Vendors are also introducing new size categories, such as 58-inch.

3DTV penetration in 2013 should reach around 25-26%, up from 19.9% in 2012, while direct LED penetration should grow from 10.5% to 18-20% in 2013.

When it comes to Smart TVs, WitsView says the device category remains "limited" in both software content and operator support, meaning sales will remain low-- unless Apple launches the much anticipated iTV/Apple TV. The integration of 4K resolutions and PC-style functionality might also boost Smart TV sales, but only if the industry resolves its technology- and interest-based conflicts.

Go [TrendForce: A Surge of Replacement for LCD TV in 2013?](#)