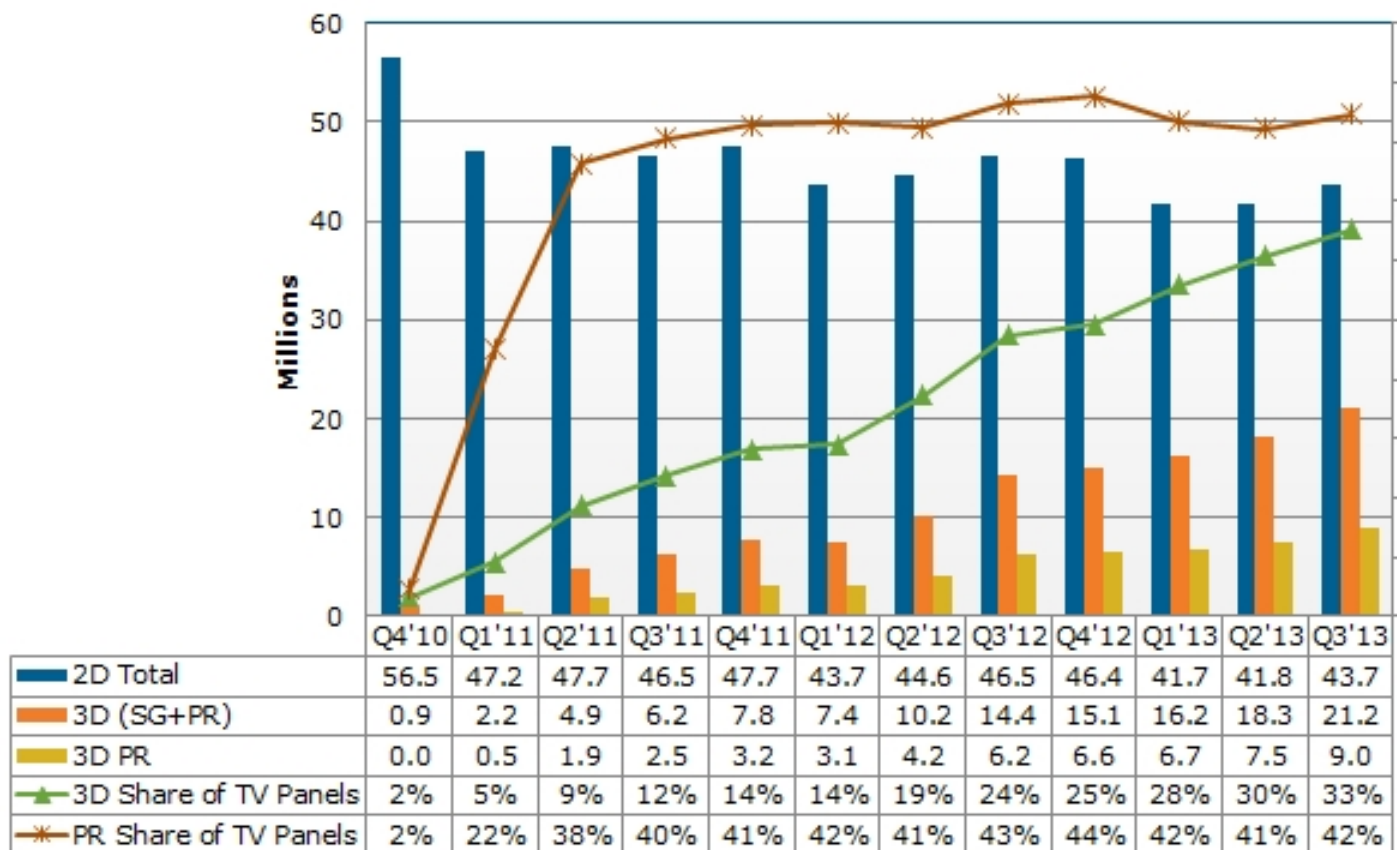


It might not be growing as fast as the industry expected, but 3DTV still shows a steady penetration rate-- nearly 30% of LCD TV panels shipped in 2013 will be 3D-capable according to NPD DisplaySearch.

And as 3DTV demand slowly grows, the competition between the two 3D technology also starts simmering. The analyst forecasts 3D patterned retarder (3D PR) film demand for passive 3DTV use will grow by 104% Y-o-Y in Q4 2012 before shipments reach 34 million units in 2013.

**Figure 1. Optical Film Shipment Forecast by Technology**



Source: NPD DisplaySearch [Quarterly Display Optical Film Report](#)

"3D PR film reportedly minimizes eye fatigue, and demand for 3D PR is growing at a much faster pace," DisplaySearch says. "It is forecast to account for 48% of total 3DTV panel

shipments in 2013, up from 39% in 2011."

When it comes to panel makers, LG Display is the top 3D PR panel supplier for TVs, and the only supplier of 3D PR monitor and notebook panels in 2012, even if DNP takes 20% of 3D PR film demand for TV panels in Q3 2012.

"The competition among 3D PR film manufacturers is expected to intensify, as film manufacturers look to compete," the analyst concludes. "Chinese panel makers such as CEC-Panda and China Star are starting to produce 3D PR TV panels, and LG Display is expanding production of 60-inch+ panels in 2013-- potentially joined by Sharp. Demand for 3D PR film is anticipated to rise, which will draw in other film manufacturers as well."

Go [Demand for 3D Optical Film Rises as Passive 3DTV Competes with Shutter Glass \(NPD DisplaySearch\)](#)