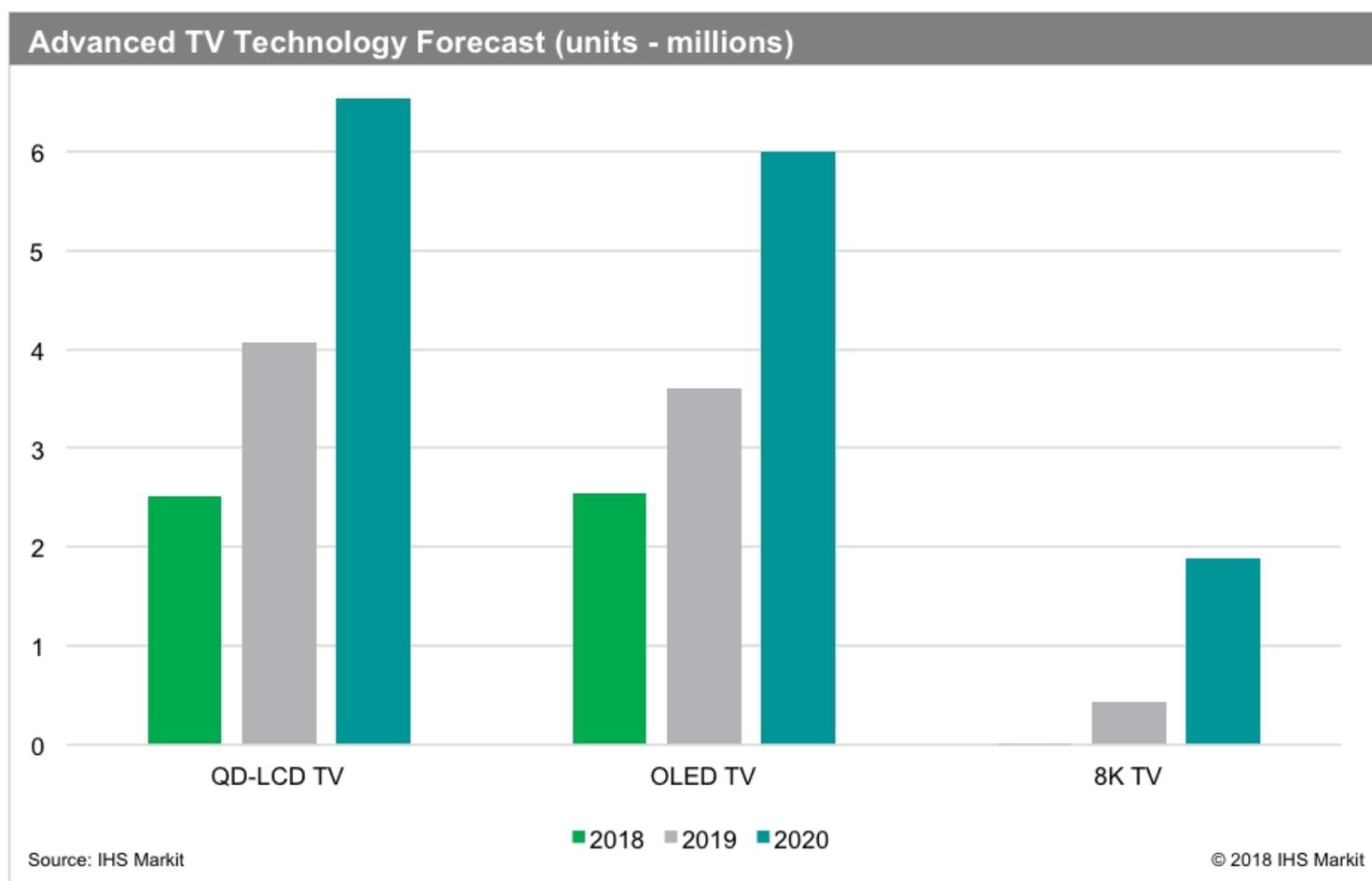


IHS Markit: Global TV Market Returns to Growth

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The TV market is set to return to growth in 2018, IHS Markit reports-- after the decline of 2017, TV shipments should grow by 3.6% in 2018, with an additional 1.4% growth on 2019 shipments reaching 226 million units.

Over 50% of the TVs forecast to ship in 2019 will be UHD models, with the majority being 4K. However, 8K TVs from major brands are to launch by end 2018, kicking off the next wave of resolution transition.



“Growth in the TV market typically is the result of more attractive retail prices for large-screen sizes and the continued commoditisation of 4K resolution, driving TV replacements and upgrades,” the analyst says. “However, this growth through price compression has a negative effect on profits, so TV brands are actively looking for more growth from advanced TV models to

improve earnings.”

Technologies such as 8K, OLED and quantum dot (QD) carry "substantial" premiums, and even 4K TVs carry premiums of over 35% at screen sizes where 1080p is still an option, such as 40-49-inch. As such, the growth in 8K TVs-- with shipments growing from 20000 in 2018 to over 430000 units in 2019, before approaching 2m units by 2020-- is centered on 60-inch and larger sizes, with 65-inch TVs accounting for over 50% of the volume.

OLED TVs are to grow by over 40% in 2019, reaching 3.6m units. Such numbers are in line with previous forecast, with demand matching production capacity. The OLED size mix still favours 55-inch (as based on current prices), but will transition to 65-inch by 2020 once production is optimised to larger sizes and substantial OLED TV growth is expected.

IHS Markit expects quantum dot LCD TV shipments to exceed 4m units in 2019 thanks to aggressive pricing and transitional quantum dot-equipped LCD TVs. The prices of non-QD-equipped TVs and the prices of low end QD TVs have moved closer together, so much so the QD premium is less than 100% at mid-range sizes, opening the technology to a larger addressable market of consumers.

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