The global projector market came in at 1.76 million units in Q1 2013, according to **Futuresource Consulting**. That is a year-on-year **decline of 7.5%**.

The largest declines came in the standard definition **mainstream products** (1000 - 3999 Lumens) as demand contracts in key western territories. Growth markets like Russia and India that had driven volumes in CY Q1 2012 experienced a difficult quarter as funding for education and public sector projects were suspended.

Globally, volumes of mainstream SVGA projectors fell 13.2% while mainstream XGA volumes declined 16.7% YoY. Widescreen resolutions continued to take a share of the mainstream segments, B2B WXGA volumes grew 7.7% YoY while volumes of B2B 1080p product grew 74.7% with favourable pricing expected to increase demand for these products during the rest of the year.

While mainstream volumes suffer, the **installation and large venue** segment (4000+ Lumens) continues to return good business, global volumes increasing 9.8% YoY to reach 146K units. As a number of vendors continue to target the installation business, price competition is helping to drive increased adoption of widescreen formats in the 4000 - 6999 lumen market, widescreen resolutions accounted for 43% of total sales in the segment, up from 36% in CY Q1 2012.

The dedicated **home cinema market**, which typically experiences a slow post-Christmas in Q1, remained relatively consistent in the period, volumes increasing less than 2% YoY, 720P and WXGA models retain their price position in the market maintaining a 33% share. As global volumes of dedicated home cinema volumes remain stagnant, vendors show increased innovation in the sector with new products including LG's Hecto Laser TV coming to market in Q1 2013.

In the **Ultra Mobile** segment (sub 2KG projectors) LED models continue to fuel the market, taking share from lamp based models. The global ultra-mobile market grew 26.7% YoY in CY Q1, LED volumes increasing 31.4%. As the brightness of LED models increases, the B2B applications for these products increase also providing new markets for LED projectors in the road warrior and small meeting room sectors, taking share from lamp based models. A host of new models in this segment due this year are expected to continue this trend including the ML1000 from Optoma and Qumi Q7 from Vivitek.

While sales of **solid-state illumination** projectors in the 1000 lumen+ B2B segment had performed below expectations in 2012, largely due to the high upfront cost, Futuresource anticipates better sales of SSI projectors in 2013. This anticipation is not only based on an expected reduction in manufacturing costs but also with the technology penetrating the installation market, notably with Panasonic's solutions enjoying a warm reception in 2013 Q1. Sony's SSI solution, due to go on sale later in 2013, is also expected to increase the share of SSI against lamp-based solutions.

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