

Cloudy TV Panel Market?

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WitsView says IT panel prices in May (amid uncertain market demand in the TV segment), were only up slightly. Given the fully loaded utilization rate and continued capacity increases, the current IT panel demand and supply is in a relatively balanced state, while the TV segment experiences an oversupply.

The Sichuan earthquake may affect the TV end market sales to a certain extent. Meanwhile, on 5/15, the CEO of LGD indicated that with its main TV clients affected by the weak seasonality, it hopes to mitigate the impact by cooperating more closely with the Samsung group in TV products, along with the shifting some excess capacity to IT panels.

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