

The Asian TV Industry

An Overview of Asian TV Manufacturers

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TV Manufacturing in Asia

An Overview of Asian TV Manufacturers

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First Edition Published: October 2007

ISBN: 1 905429 142

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1 Introduction

The following report provides an overview of the major manufacturers of TVs in Asia. It has been published in conjunction with an earlier study, published in March 2007, which looked at the situation in Europe*.

The current report highlights the dominant position held by China, not only in Asia, but also globally with all the leading manufacturers establishing a manufacturing presence in the country. China also has a significant number of indigenous companies with the leading companies themselves now establishing a global manufacturing footprint as they increase their presence globally. Outside of China the world's leading manufacturers have also established manufacturing facilities in other Asian countries including the emerging markets of India, which also has a significant number of domestic manufacturers, and Vietnam.

Japan, which boasts some of the world's largest manufacturers had been losing share of production as manufacturers looked to reduce costs by moving manufacturing offshore. However, in recent years the country has benefited from the preference for companies to initially manufacture new flat panel display TVs domestically.

Chapter 2 provides an overview of Asian TV production including historical data. The historical data has been extracted from Reed Electronics Research's *Yearbook of World Electronics Data* an on-going information service which provides production and market data on 53 countries (for further information please visit www.rer.co.uk). A brief outlook on future prospects is provided for each country. Care has to be taken when looking at overall production figures as they can include both Semi Knocked Down (SKD) and Complete Knocked Down (CKD) sets which are exported and assembled in other countries.

Chapter 3 provides profiles of the principal companies manufacturing TVs in Asia and is the main focus of the report. 107 major companies have been identified with TV manufacturing or assembly locations in Asia have been profiled within the study. Overall Chinese manufacturers dominate in terms of actual numbers although only a few Chinese companies have established a major global presence, while other Asian companies have remained relatively small.

This report has also tended to focus on traditional TV manufacturers. Over the next five years an increasing share of LCD TV production will be outsourced to ODM and to a lesser extent EMS companies.

Chapter 4 provides information on a number of smaller companies and again the manufacturers are primarily Chinese. The table is not comprehensive as many Chinese companies with a broader product portfolio produce only a small number of TVs annually.

Finally, a listing of principal manufacturing locations by country is provided in Chapter 5.

* For further information on Reed Electronics Research's report on the European TV manufacturers please visit www.rer.co.uk

- Teco Electric and Machinery
- Wistron

2.2.9 Thailand

In 2005, Thailand produced an estimated 24 million colour televisions up from 20 million a year earlier, the country being a favoured location for the leading Japanese and South Korean manufacturers. Companies with manufacturing facilities in the country include:

- Funai Electric
- JVC
- LG Electronics
- Matsushita Electric Industrial
- Orion Electric
- Samsung Electronics
- Sony Siam Industries
- Tatung
- TCL

Thai-based manufacturers of colour TVs have benefited from the various free-trade agreements between the country and other emerging markets. Both Sony and Matsushita (Panasonic) are serving the Indian market from Thailand, with Sony ending TV assembly in India.

It is expected that Thailand will remain an important country for TV assembly although it will face increasing competition for future investment, in particular, from Vietnam. It is also expected that increased production in other regions, such as Europe will have an impact on production in the country.

2.2.10 Vietnam

Although TV production in Vietnam was only 1.8 million units in 2005 the country is attracting significant investment in new manufacturing facilities, in part as companies look to alternatives to China. Leading TV manufacturers with operations in the country include:

- LG Electronics
- Matsushita Electric Industrial
- Samsung Electronics
- Toshiba
- TCL

TCL's main production base for TVs in Southeast Asia is located in Vietnam, the Chinese company reportedly looking to increase capacity in the country to one million units by 2008. The company will use the factory to supply not only the local market but also the markets of Thailand, Malaysia and elsewhere.

TV production is forecast to reach six million units by 2010 but could be higher if new companies establish operations in the country and existing manufacturer's ramp up production.

3 Company Profiles

3.1 Action Electronics Co Ltd (Taiwan)

Action Electronics, founded in Taiwan in 1976, manufactures LCD TVs and monitors, portable DVD players and automotive A/V products. Products are sold under the Axion brand name.

The company, which has traded on the Taiwan Stock Exchange since 1998, had sales in 2005 of NT\$17,524 million. Action employs over 100 people in its 3 R&D centres in Taiwan, and in addition to its production facilities in Chung Li, Taiwan, it has established manufacturing plants in Penang, Malaysia (from 1988), Shenzhen, China (from 1993) and Shanghai, China (from 1999).

Products: LCD

Headquarters

198 Sinjhongyuan Road

Jhongli City

Taoyuan County 320

Taiwan

Tel: +886 3 4515494

Fax: +886 3 452 0697

Website: www.action.com.tw

3.2 AIC Display Sdn Bhd (Malaysia)

AIC Display Sdn Bhd is a subsidiary of AIC Corporation Berhad, a Malaysian company operating in three areas: semiconductors; electronic components; and displays. However, as part of a strategic review of its operations, whereby the company will focus on its semiconductor activities, the Group announced in September 2007 that it had, subject to various approvals, entered into an agreement with FTEC Resources Board for the sale of its display activities.

FTEC is a Malaysian company focused on IT and related products. The acquisition of AIC will strengthen the company's position in LCD and plasma displays.

AIC Display was established in 2003 and designs, develops and manufactures multimedia display products including TFT LCD and plasma monitors and digital TVs. The company currently has two production lines capable of manufacturing monitors and TVs up to 50-inches.

Products: LCD, plasma

Headquarters

AIC Display

Lot 1 Persiaran Kemajuan Seksyen 16

40200 Shah Alam

Selangor Darul Ehsan

Malaysia

Tel: +60 3 5549 2922

Fax: +60 3 5549 2622

Website: www.aic.com.my

In Indonesia recent investment has increased capacity from 3,000 LCD TVs per month to 10,000 units per month, with PDP TV production facilities also being added. In Europe production is based in Plymouth, England, which now focuses on LCD TVs and a new production and sales company for LCD TVs has been established in Kobierzyce, near Wroclaw, Poland. In North America, Toshiba has plants in Lebanon, TN, USA and Ciudad Juarez, Mexico.

Products: LCD, PDP, Projection

Headquarters

1-1, Shibaura 1-chome
Minato-ku,
Tokyo 105-8001
Japan
Tel: +81-3-3457-4511
Fax: +81-3-3456-1631
Website: www.toshiba.co.jp

3.96 Tousda Electronic Appliance Co Ltd (China)

Tousda, with around 2,000 employees, is a leading manufacturer of colour TVs with a reported annual sales volume of 4.8 million CTV, SKD and CKD sets. The company has more than 50 OEM customers globally.

Headquarters

Dongbian Village
Xiangang
Songgang Town
Nanhai District
Foshan City
Guangdong 528234
China
Tel: +86 757 85239391
Fax: +86 757 85239392
Website: www.tousda.com

3.97 TPV Technology Limited (Hong Kong)

Hong-Kong-listed TPV Technology Limited is the world's largest supplier of PC monitors in terms of unit shipments. In December 2004 the company signed an agreement with the Dutch Philips group, which resulted in the company taking over Philips' OEM monitor business and the production of the company's entry level flat panel TVs and branded monitors. The agreement included the transfer of manufacturing operations in China, Brazil and Hungary.

As part of the restructuring of the Philips contributed business, production at the Dongguan, China plant was permanently shut down in March 2006, while production facilities at the Suzhou plant were revamped to focus solely on LCD and PDP TV production, with a capacity of 4.8 million units per year. TPV also produces LCD TVs at its Fuqing, Fujian Province plant (capacity of 2.0 million units per year)

Shenzhen Wistar Technology, Shenzhen, Guangdong
Shenzhen Vcan Inition Technology Development, Shenzhen, Guangdong
Shenzhen Yongdefu Electronic Industry, Shenzhen, Guangdong
Shining International, Guangzhou
Skyworth Group, Shenzhen
Sony, Wuxi
SVA Information Industry, Shanghai
Tatung, Wujiang City, Jiangsu
TCL, Huizhou
TCL, Henan
TCL, Wuxi
TCL, Inner Mongolia
Teco Electric and Machinery, Wuxi, Jiangsu
Teco Electric and Machinery, Suzhou
Teco Electric and Machinery, Xiamen, Fujian (opening 2008)
Titek Electronics, Shenzhen
Toshiba, Dalian
Tousda Electronic Appliance, Foshan, Guangdong
TPV Technology, Fuqing, Fujian
TPV Technology, Suzhou
TPV Technology, Beijing
Tuo Hao Electronics (Shenzhen), Shenzhen, Guangdong
Wanlida Group, Zhangzhou
Xiamen Overseas Chinese Electronic, Xiamen
Xinhui Yinke Computer Manufacturing, Jiangmen, Guangdong
Xoro Electronics (Chengdu), Chengdu, Sichuan
Ya Hsin Industrial, Dongguan
Ya Hsin Industrial, Suzhou
Ya Xun Da (Shenzhen) Industrial, Shenzhen, Guangdong
Zhejiang Elfag Digital Technology, Yiwu, Zhejiang
Zhejiang Shiru Digital Technology, Ningbo, Zhejiang
Zhuhai Chengfeng Electronics, Zhuhai, Guangdong
Zhuhai Sunprince Technology, Zhuhai, Guangdong

5.2 India

Dixon Technologies, Noida
Dixon Technologies, Dehradun
Dixon Technologies, Jammu
Dixon Technologies, Mohali
Humax, New Delhi
Konka, Noida
LB Electronics, Ghaziabad
LG Electronics, Greater Noida
LG Electronics, Pune
LG Electronics, New Delhi
Malhotra Electronics, New Delhi
Matsushita Electric Industrial, Noida
MIRC Electronics, Mumbai
MIRC Electronics, Noida
MIRC Electronics, Roorkee
PG Group, Greater Noida