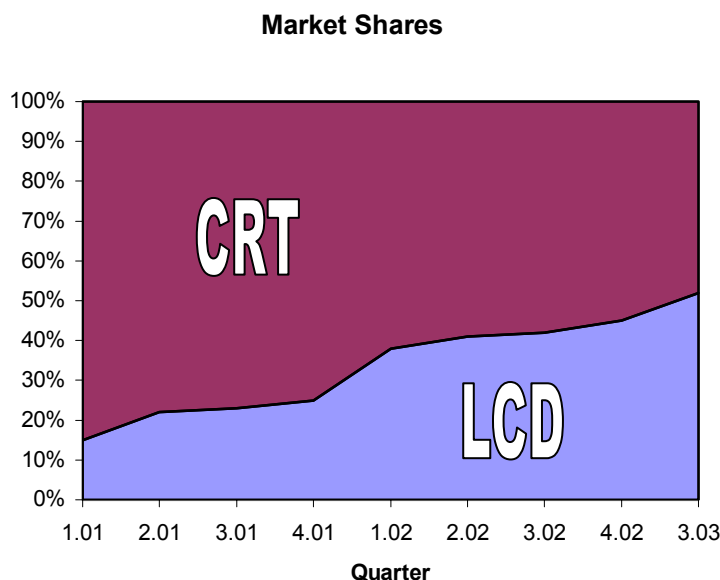


Review on German Market

LCD Market is growing permanently

Source: IT-Business News, 23rd of June, 2003, original version is in German language.

The market for computer monitors is in a very hard competition. New developments like multimedia or home entertainment urge the manufacturer to bring up new appliances that normally are only sold at the high end market at the beginning. So high end appliances are the most innovative ones.



Sales figures for LCD monitors are growing. For the 3rd quarter in 2003 it is expected that more than 50% of all sold monitors in Germany will base on LCD technique.

LCD monitors are expected to vanish from the market. (Ulrich Zott, Product manager, IYYAMA). 21" panels will stay very expensive in the next few years, so that it is expected that this appliances will only be sold in lower numbers.

Oversized panels are expected to have a good chance at the market because more and more public institutions or hotels are discovering them as a very smart way for self presentation and advertising.

New multimedia options will raise the sales figures for 17" and 19" panels, because 15" panels are no big enough to enjoy the multimedia contents. At the moment 15" panels are leading at the LCD market but sales figures on 17" panels will grow very quickly so that it is expected them to be the most sold screen size at the 3rd quarter of 2003. Also the prices for 19" panels will decrease so that there will be a bigger amount of sold 19" monitors.

In the middle range and the low end market, money can only being made by selling big numbers of the appliances. Therefore standards for screen sizes are very important.

Most of the sold LCD panels are 15", 17" and 19" panels. Because there are only very few manufacturer for this panels, it is important for the assembler to sell as many unique appliances as possible so that they can decrease the costs for the panels themselves.

Because of this fact, 18"

LCD Monitors in Germany 2002

Manufacturer / Brand name	Sold items	Market Shares [%]
Fujitsu-Siemens	275,797	10.4%
HP	202,370	7.6%
Ingram	197,682	7.4%
Samsung	169,571	6.4%
LG	132,033	5.0%
Dell	117,534	4.4%
Eizo	107,971	4.1%
NEW Mitsubishi	101,679	3.8%
Philips	98,272	3.7%
Medion	81,669	3.1%
Benq	80,476	3.0%
AOC	72,317	2.7%
Sampo	71,576	2.7%
Vobis	70,795	2.7%
Maxdata	66,248	2.5%
Others	811,927	30.5%
Total	2,657,917	