The outlook for UHD services worldwide
Almost 60% of TVs selling today are UHD; shipment share by region, Q4 2019

- Globally, UHD resolutions exceeded half of TV shipments for the first time in Q4’18 and were almost 60% in Q4’19.
- Western Europe UHD growth is tied to underlying screen size growth
- North America surged from Q3’19 as smaller, non-UHD set shipments were hit by increased tariffs.
- Japan lags somewhat due to a preference for smaller (non-4K) screen sizes — shipments accelerated since launch of UHD services in Q4’18.

**UHD TV resolution shipment share trend**

[Source: Omdia] (© 2020 Omdia)
The Coronavirus outbreak has totally altered the outlook for the TV market in 2020, and UHD is seriously affected. We reduced our overall 2020 TV shipment forecast by 22 million, largely in the first half of the year.

We forecast static shipments in 2020, with North America and Western Europe already heavily affected in Q2.

China may see slight growth.

The biggest question is around emerging markets, depending on whether their early actions to control spread of the pandemic are effective.
UHD households

- We define a UHD household as having at least one UHD TV.
- We factor into the estimates new TV shipments, retirement of old units, replacement cycles, and households with more than one UHD TV.
- North America will lead, 40% of households had a UHD set by the end of 2019, over 50% in 2021, and 71% in 2024.
- China leads on shipments, but its huge number of households means a slower shift to a UHD installed base, achieving 41% in 2023.
- Western Europe will reach 60% by 2024, with a faster growth rate than China due to a more rapid TV annual replacement rate.
- Japan’s preference for smaller screen sizes means only a quarter of households own a UHD set by the end of 2020 and 47% by 2024, despite UHD broadcasts already being available.
UHD channels

- Our count is of the number of unique channels available in each region
  - Any country will have a subset of channels
  - A service will have a combination of channels

- Unsurprisingly, Japan is the single country with most UHD channels
  - However UHD TV uptake remains slow.

- Russia and India have surprisingly high UHD channel counts

- China’s UHD channel count is extremely low.

![Graph showing unique linear UHD channels by region](source: Omdia)

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