Contents

BUSINESS UPDATE

BUSINESS OPPORTUNITIES

SAMSUNG STRATEGY

KEY TAKEAWAYS
FY 2018 Net Revenue

$29B

MOBILE 76%

LARGE DISPLAY 24%

Business Accomplishment

Display Market Share

1

23% (Revenue base, IHS)
LEADERSHIP : MOBILE DISPLAY

Mainstream in the Small-Medium Display Market
LEADERSHIP : LARGE DISPLAY

Driving Premium Products

TV
8K, QD, Ultra Large Size

Monitor
Curved
32:9 Super Ultra wide

PID
Extremely narrow Bezel
NEW PARADIGM : 5G

Display Centric World is Coming

- Infrastructure
- Display
- Lifestyle

3G/4G
Picture, Video

LTPS LCD
Rigid OLED

5G
HDR + Streaming + IoT

Flexible OLED

Personal

Display of Things
DAILY LIFE OF TOMORROW

Display of Things 24/7

Refresh
Morning

Active and Dynamic
Mid-Day

Relax and Enjoy
Night

One Day in Display Centric World
The Birth of Next Generation Devices

Big Bang
- Authentic Image
- Vivid Color
- Free Form
- High Contrast
- Seamless Design

New
- Medical
- Watch
- Foldable
- VR
- Interior
- Automotive
- Mobile
- Home Appliance
CONTINUOUS GROWTH OF PREMIUM TV MARKET

Rapid Growth in Ultra Large-sized & High Resolution TVs

Average TV Size

<table>
<thead>
<tr>
<th>Year</th>
<th>39”</th>
<th>46”</th>
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<tbody>
<tr>
<td>2015</td>
<td></td>
<td></td>
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<td>2019</td>
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<tr>
<td>2020</td>
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</tbody>
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Source: IHS

Global TV Demand

CAGR 32% (Revenue)

Over 65” UHD

Revenue

8%

36%
BUSINESS UPDATE
BUSINESS OPPORTUNITIES
SAMSUNG STRATEGY
KEY TAKEAWAYS
SAMSUNG STRATEGY

Unrivaled, Cutting Edge Capabilities

- **Product Performance**
- **New Applications**
- **Customer Portfolio**
- **Operational Excellence**
MOBILE DISPLAY BUSINESS

NEW APPLICATIONS

TECHNOLOGY DIFFERENTIATION

CUSTOMER & PRODUCT PORTFOLIO
NEW APPLICATIONS

Securing New Growth Engines

- Foldable
- Notebook
- Automotive
- Next Apps (Under Development)
TECHNOLOGY DIFFERENTIATION

Continuous Effort for Technological Leadership

Design
- Full Screen
- Foldable
- Automotive

UX
- Embedded Sensors
  - Fingerprint
  - Haptic
  - Speaker
- Human Friendly
  - Color Accuracy
  - Less Blue Light

- Less Blue Light

Continuous Effort for Technological Leadership

Full Screen
Foldable
Automotive

UX
Fingerprint
Haptic
Speaker
CUSTOMER & PRODUCT PORTFOLIO

New Customers and Wide Range of Products Driving Growth
LARGE DISPLAY BUSINESS

TECHNOLOGY DIFFERENTIATION

NON-TV BUSINESS LEADERSHIP

OPERATIONAL EXCELLENCE
TECHNOLOGY DIFFERENTIATION

Breaking Boundaries Between Screen and Reality through Perfect QD

1st Generation
LCD

2nd Generation
LED

Next Generation
QD

Perfect QD
- Off-Angle Viewing
- Dynamic Brightness
- Authentic Image
NON-TV BUSINESS LEADERSHIP

Developing Higher Value Market with PID & Monitor

PID

Monitor
OPERATIONAL EXCELLENCE

Core Competencies Enabling Constant Innovation and Stable Profit

Enhancing Productivity

Reducing Assembly Cost

Optimizing Management
KEY TAKEAWAYS

Differentiated Products Creating New Opportunities

Strengthen Leadership with Technology Innovation

Providing The Best Solution for Display of Things
Display Beyond Imagination

SUSTAIN BUSINESS GROWTH

Advanced Technology
Product & Customer Portfolio
Operational Excellence

SAMSUNG DISPLAY