



TV Technologies to create unique viewing experiences

November, 2008

NXP Semiconductors

- ▶ Established in 2006 (formerly a division of Philips)
- ▶ Builds on a heritage of 50+ years of experience in semiconductors
- ▶ Headquarters: Eindhoven, the Netherlands
- ▶ Provides engineers and designers with semiconductors, system solutions and software that deliver better sensory experiences
- ▶ Net sales of \$6.32 billion in 2007 *)
- ▶ Key focus areas:
 - Home
 - Automotive & Identification
 - Multimarket Semiconductors
- ▶ Owner of NXP Software: a fully independent software solutions company



*) These figures include the Mobile & Personal business which is largely part of the ST-NXP Wireless JV since August 2, 2008

Strong customer base

Strategic Accounts



Identification



SPSL



Automotive

DELPHI



MMS



Home

TCL

HUMAX



SHARP



THOMSON



Channel

Distis



EMS

FLEXTRONICS

JABIL



BU Home businesses

Consumers' TV viewing experience

TV



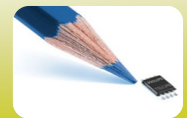
Digital TV: **becoming leader**
Analog CRT: **leader**
PC Video: **leader**
Analog Matrix: **leader**

STB (incl. CNXT BMP pro forma)



Mainstream FTA: **leader**
Satellite Operator: **leader**
Cable: **major player**
IP: **major player**
Media processing: **leader**

Front-End (IF, Si Tuner): **leader**
Media Interfaces (HDMI, DP): **major player**



BL RFS (can tuner): – **major player**
merged with Thomson Can Tuners into new company NuTune



NXP BU Home

Lead in focus areas

- ▶ Leading in picture quality developments for TV, STB, PC TV, with:
 - Motion Accurate Picture Processing: first to remove all artifacts from HDTV motion pictures
 - Best digital natural motion
 - EDDI
 - Active picture control
 - MPEG artifact reduction
- ▶ 50+% share in value and 45% share in volume in the TV reception tuner IC market, including TV, Recording and STB
- ▶ #1 in PC TV, with 1 in 2 PC TVs using our SOC, tuner can, and silicon tuner chipsets
- ▶ 50% market share of our RF front-end module in digital terrestrial set-top boxes



Mission of NXP Semiconductors BU Home

Our mission in TV

- ▶ ***Creating differentiating TV viewing experiences***
 - More content, from all TV standards and formats:
 - Best TV picture quality
 - TV anytime/anywhere; in the home and on the go
 - Low energy TV
- ▶ ***Maintaining a unique technology source to support our customers***
 - Strong DNA in STB and DTV technology
 - Professional people to support our customers locally
 - A wealthy IP portfolio
 - A unique line-up in systems and components
 - Intense relationships with our partners



Best TV picture quality

From SD to HD to Full HD without artifacts

- ▶ Most extensive portfolio Picture Quality IP (a.o. ME/MC)
- ▶ Leader in Natural Motion demonstrated in the PNX 51XX family
- ▶ Best Halo Free Natural Motion performance in the industry (MAPP2)
- ▶ 120Hz Solutions available with 240Hz solutions in development
- ▶ Combining high picture quality with slim design and saving on power consumption by LED Edge-lit backlighting
- ▶ High contrast, true black and 50% power saving by LED Full-lit backlighting and PXN5100



TV anytime / anywhere

From broadcasted to networked TV at home and on-the-go

- ▶ Silicon tuners and PCTV systems enabling TV reception on-the-go on portable devices such as laptop
- ▶ Streaming content from STBs to mobile devices (with NXVision)
- ▶ iDTV enabling e.g. Internet TV
- ▶ Video On Demand (Netflix)
- ▶ Taking your home TV content with you (Sling Catcher)
- ▶ Docsis
- ▶ 802.11n
- ▶ USB
- ▶ CI+ security on our DTV and STB platforms



Low energy TV

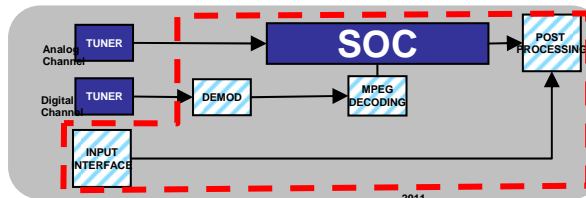
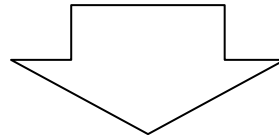
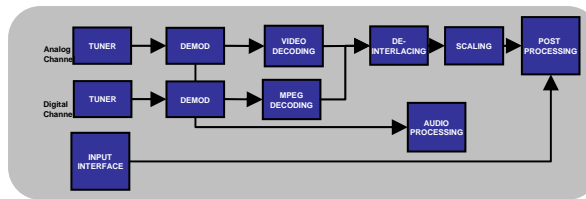
- ▶ Green chip to save energy in stand-by mode
- ▶ LED backlighting for LCD TV
 - Edge-lit
 - enabling ultra-slim TV: 1.65 cm or 0.65 inch
 - power saving on average 30%
 - Full-lit
 - Perfect contrast due to backlight partitioning
 - Light and colors* where the picture needs them
 - Power saving on average 50%



Continued innovation drives TV market growth

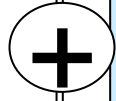
Integration to allow more (high end) features to enter the mainstream TV market

Less integrated eBOM integrated into SoC in 2011



Continued innovation

- Video decoding (H.264, AVS)
- New displays (120Hz, OLED)
- Video processing (MEMC, 3D graphics)
- Networking (802.11n, DVR)



Solution today:
less integrated

Solution tomorrow:
*Advanced,
innovative
integration*

 Partial integration

NXP semiconductors

- ▶ *Creates differentiating TV/video viewing experiences*
- ▶ *With a unique technology source*
 - *People*
 - *IP*
 - *Products*
 - *Systems*
 - *Partners*
- ▶ *To support our customers in developing winning TV, STB and PCTV propositions*



