

Global QD Film for TV Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global QD Film for TV market size is expected to reach \$ 630 million by 2032, rising at a market growth of 11.0% CAGR during the forecast period (2026-2032).

Quantum Dot Enhancement Film for Television is a photoluminescent optical film or sheet installed in the backlight stack of an LCD television to convert part of the blue light emitted by conventional or miniLED backlights into spectrally narrow red and green light, thereby producing a high-quality white-light spectrum with wider color gamut, higher color volume or improved optical efficiency. The product typically consists of red and green quantum dots dispersed in a polymer or resin matrix, together with one or two moisture-and-oxygen barrier layers, protective layers, adhesives and optional diffusion or brightness-enhancement structures. The scope includes conventional barrier QD films, cadmium-free InP films, perovskite conversion films, barrier-free laminates and multifunctional QD composite films supplied as rolls, master sheets, cut-to-size sheets or laminated backlight subassemblies for televisions. Raw quantum dots, standalone barrier films, rigid QD diffuser plates, QD tubes, ordinary optical films, QD-OLED color-conversion layers, QD color-filter inks, electroluminescent QD emitter layers, display panels, backlight modules and finished televisions are excluded. The 2025 weighted ASP is approximately US\$14 per square meter, global sales volume is approximately 20.70 million square meters, and the estimated average gross margin is approximately 35%. Upstream activities include quantum-dot synthesis, ligand and resin formulation, barrier-film extrusion, adhesive preparation, release-liner supply and optical-grade substrate production. Midstream activities include dispersion, precision coating, curing, barrier encapsulation, calendaring, lamination, slitting, die cutting, optical matching, reliability testing, clean production and application engineering. Downstream customers include optical-film converters, backlight-module manufacturers, LCD panel makers and television manufacturers.

The market is expanding through premiumization rather than broad growth in total television shipments. Even when global TV units remain flat, rising penetration of wide-color-gamut LCD televisions and a shift toward larger screens increase the addressable area for QD film.

Screen-size migration has a disproportionate effect on film demand. A 75-inch television consumes substantially more optical-film area than a 55-inch model, so area growth can remain positive even when television unit shipments decline slightly.

MiniLED backlights and QD film are complementary in many premium LCD architectures. Local dimming improves contrast and peak brightness, while QD film improves spectral purity and color gamut. Their combined adoption is moving QD film from a premium-only component toward higher-volume midrange television platforms.

Average selling prices will continue to decline as coating yields improve, local supply expands and high-cost barrier layers are simplified. Barrier-free quantum dots and integrated QD composite films can reduce layer count, handling steps and assembly cost, supporting broader adoption without requiring revenue growth to match area growth.

Cadmium-free migration remains an important material-development direction. InP formulations have become the principal commercial cadmium-free route, while perovskite formulations offer attractive spectral width and efficiency but still require rigorous control of moisture, heat, blue-light flux and regulated-element content.

Reliability is the main technical qualification barrier. Suppliers must control water-and-oxygen ingress, edge degradation, blue-flux aging, color shift, luminance uniformity, particle agglomeration and long-duration thermal-humidity performance across large television areas.

Multifunctional integration is changing the value proposition. Combining color conversion with diffusion or brightness enhancement can simplify the backlight optical stack, but it also raises the burden on coating uniformity, optical matching, warpage control and customer-specific design.

Substitution risk is material. OLED and QD-OLED compete at the premium end, while RGB MiniLED and advanced phosphor systems can produce wide color gamut without a separate QD film in some designs. Suppliers therefore face program concentration,

annual price reduction and customer-qualification risk despite favorable area growth.

Report Scope

This report studies the global QD Film for TV production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for QD Film for TV and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of QD Film for TV that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global QD Film for TV total production and demand, 2021-2032, (Sq m)

Global QD Film for TV total production value, 2021-2032, (USD Million)

Global QD Film for TV production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Sq m), (based on production site)

Global QD Film for TV consumption by region & country, CAGR, 2021-2032 & (Sq m)

U.S. VS China: QD Film for TV domestic production, consumption, key domestic manufacturers and share

Global QD Film for TV production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Sq m)

Global QD Film for TV production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Sq m)

Global QD Film for TV production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Sq m)

This report profiles key players in the global QD Film for TV market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Nanjing Bready Advanced Materials Technology (Group) Co., Ltd., Ningbo Exciton Technology Co., Ltd., Wah Hong Industrial Corporation, Avantama AG, SHOEI CHEMICAL INC. (Nanosys), Nanoco Group plc, Najing Technology Corporation, Suzhou Mesolight Nanotechnology Co., Ltd., Guangdong Poly Optoelectronics Co., Ltd., Hansol Chemical Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World QD Film for TV market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Sq m) and average price (US\$/Sq m) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global QD Film for TV Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global QD Film for TV Market, Segmentation by Type:

Cadmium Quantum Dot Film

Cadmium-free Quantum Dot Film

Global QD Film for TV Market, Segmentation by Television Size:

Below 55 Inches

55 to Below 65 Inches

65 to Below 75 Inches

75 Inches and Above

Global QD Film for TV Market, Segmentation by Finished-Film Thickness:

Below 150 ?m

150 to Below 250 ?m

250 to Below 400 ?m

400 ?m and Above

Global QD Film for TV Market, Segmentation by Application:

Residential Retail Television

Hospitality Guest-Room Television

Institutional Shared-Viewing Television

Commercial-Premises Television Receiver

Companies Profiled:

Nanjing Bready Advanced Materials Technology (Group) Co., Ltd.

Ningbo Exciton Technology Co., Ltd.

Wah Hong Industrial Corporation

Avantama AG

SHOEI CHEMICAL INC. (Nanosys)

Nanoco Group plc

Najing Technology Corporation

Suzhou Mesolight Nanotechnology Co., Ltd.

Guangdong Poly Optoelectronics Co., Ltd.

Hansol Chemical Co., Ltd.

LMS Co., Ltd.

Samsung Electronics Co., Ltd.

Key Questions Answered

1. How big is the global QD Film for TV market?
2. What is the demand of the global QD Film for TV market?
3. What is the year over year growth of the global QD Film for TV market?
4. What is the total value of the global QD Film for TV market?
5. Who are the Major Players in the global QD Film for TV market?
6. What are the growth factors driving the market demand?

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