

# Global QD Film for TV Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global QD Film for TV market size was valued at US\$ 298 million in 2025 and is forecast to a readjusted size of US\$ 630 million by 2032 with a CAGR of 11.0% during review period.

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 is a detailed and comprehensive analysis for global QD Film for TV market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

## Key Features:

Global QD Film for TV market size and forecasts, in consumption value (\$ Million), sales quantity (Sq m), and average selling prices (US\$/Sq m), 2021-2032

Global QD Film for TV market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Sq m), and average selling prices (US\$/Sq m), 2021-2032

Global QD Film for TV market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Sq m), and average selling prices (US\$/Sq m), 2021-2032

Global QD Film for TV market shares of main players, shipments in revenue (\$ Million), sales quantity (Sq m), and ASP (US\$/Sq m), 2021-2026

## The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for QD Film for TV

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global QD Film for TV market based on the following parameters - company overview, sales quantity, revenue, 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.

QD Film for TV market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

## **Market Segmentation**

### **Market segment by Type**

Cadmium Quantum Dot Film

Cadmium-free Quantum Dot Film

### **Market segment by Television Size**

Below 55 Inches

55 to Below 65 Inches

65 to Below 75 Inches

75 Inches and Above

## **Market segment by Finished-Film Thickness**

Below 150  $\mu$ m

150 to Below 250  $\mu$ m

250 to Below 400  $\mu$ m

400  $\mu$ m and Above

## **Market segment by Application**

Residential Retail Television

Hospitality Guest-Room Television

Institutional Shared-Viewing Television

Commercial-Premises Television Receiver

## **Major players covered**

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

Nanjing Technology Corporation

Suzhou Mesolight Nanotechnology Co., Ltd.

Guangdong Poly Optoelectronics Co., Ltd.

Hansol Chemical Co., Ltd.

LMS Co., Ltd.

Samsung Electronics Co., Ltd.

## **Market segment by region, regional analysis covers**

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

## **Chapter Outline**

Chapter 1, to describe QD Film for TV product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of QD Film for TV, with price, sales quantity, revenue, and global market share of QD Film for TV from 2021 to 2026.

Chapter 3, the QD Film for TV competitive situation, sales quantity, revenue, and global

market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the QD Film for TV breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and QD Film for TV market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of QD Film for TV.

Chapter 14 and 15, to describe QD Film for TV sales channel, distributors, customers, research findings and conclusion.

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