

Global Excimer Laser Annealing / Laser Crystallization Equipment Market Growth 2026-2032

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Abstracts

The global Excimer Laser Annealing / Laser Crystallization Equipment market size is predicted to grow from US\$ 509 million in 2025 to US\$ 1008 million in 2032; it is expected to grow at a CAGR of 9.1% from 2026 to 2032.

Excimer laser annealing and laser crystallization equipment refers to a class of critical process tools used in display backplane manufacturing. These systems apply high-energy pulsed laser irradiation, line-beam optics, precision scanning, and tightly controlled thermal input to transform amorphous silicon thin films deposited on glass or flexible substrates into polycrystalline silicon or LTPS-like high-mobility materials. A typical system integrates an excimer or ultraviolet solid-state laser source, beam-shaping optics, line-beam delivery, substrate handling, process chamber, atmosphere and temperature control, energy stabilization, in-line monitoring, and factory automation interfaces. The equipment is primarily used in AMOLED, LTPS LCD, LTPO OLED, flexible OLED, and high-performance TFT backplane production. Its industrial value lies in enabling localized high-temperature crystallization under a low overall thermal budget, thereby improving carrier mobility, device uniformity, and mass-production stability for advanced display panels.

Based on our research, the topic should be positioned as excimer laser annealing and laser crystallization equipment rather than a generic category of laser-induced crystallization tools. The core industrial use case is the conversion of amorphous silicon thin films into polycrystalline silicon or LTPS materials in display backplane manufacturing. This process is central to AMOLED, LTPS LCD, and LTPO OLED production because it directly affects TFT mobility, pixel driving capability, panel uniformity, and power-performance characteristics. Compared with general-purpose laser processing equipment, the technical barriers are concentrated in large-area line-

beam uniformity, laser energy stability, substrate thermal control, scanning accuracy, process repeatability, and mass-production uptime. As a result, the number of true production-grade OEMs is structurally limited. The difference between the broad vendor pool and the core formal list therefore reflects the real structure of the industry rather than a premature narrowing caused by missing revenue data.

Demand growth in 2025 and 2026 is mainly driven by two factors. The first is the installed base of G6 AMOLED and LTPS lines, which creates recurring demand for maintenance, laser replacement, upgrades, and process optimization. The second is the renewed investment cycle in G8.6 IT OLED lines, where larger substrates and higher panel uniformity requirements increase the complexity and value of laser annealing systems. Smartphone OLED has become more mature, while tablets, laptops, monitors, automotive displays, and high-end IT OLED panels represent the more important sources of incremental demand. However, annual market size is highly sensitive to project timing, equipment delivery, customer acceptance, and capital-expenditure cycles. For this reason, our 2025 and 2026 market estimates are conservative and focus on the narrow LTPS/LTPO display backplane equipment scope.

From a technology-roadmap perspective, XeCl excimer line-beam ELA remains the mainstream and most mature route for LTPS/LTPO display backplanes. UV solid-state laser annealing, blue-laser diode annealing, SLS-type crystallization, and semiconductor laser annealing technologies represent complementary, alternative, or adjacent routes rather than full replacements in current mass production. Future competition will focus less on headline tool price and more on line-beam scalability, energy uniformity, uptime, laser lifetime, maintenance cost, process window, and joint process development with panel makers. Oxide TFT, hybrid backplanes, and simplified process architectures may reduce the addressable demand in selected display applications, but high-performance LTPS/LTPO OLED still supports a durable need for laser crystallization equipment.

LP Information, Inc. (LPI) ' newest research report, the "Excimer Laser Annealing / Laser Crystallization Equipment Industry Forecast" looks at past sales and reviews total world Excimer Laser Annealing / Laser Crystallization Equipment sales in 2025, providing a comprehensive analysis by region and market sector of projected Excimer Laser Annealing / Laser Crystallization Equipment sales for 2026 through 2032. With Excimer Laser Annealing / Laser Crystallization Equipment sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Excimer Laser Annealing / Laser Crystallization Equipment industry.

This Insight Report provides a comprehensive analysis of the global Excimer Laser Annealing / Laser Crystallization Equipment landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Excimer Laser Annealing / Laser Crystallization Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Excimer Laser Annealing / Laser Crystallization Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Excimer Laser Annealing / Laser Crystallization Equipment and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Excimer Laser Annealing / Laser Crystallization Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Excimer Laser Annealing / Laser Crystallization Equipment market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Laser Crystallization System

Turnkey ELA Equipment

Segmentation by Technology Route:

Excimer Laser Annealing

UV Solid-State Laser Annealing

Diode / Blue Laser Annealing

Hybrid Laser Annealing

Other

Segmentation by Beam Delivery Method:

Line-Beam Scanning

Spot-Beam Processing

Area-Beam Exposure

Other Beam Delivery Methods

Segmentation by Substrate Format:

G5.5 / G6 Substrate Tool

G8 / G8.6 Substrate Tool

Other

Segmentation by Application:

Smartphone Displays

Tablet and Laptop Displays

Automotive Displays

Wearable Displays

Other Applications

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Coherent Corp.

LG Electronics Inc.

JSW Aktina System Co., Ltd.

AP Systems Corporation

DUKIN Co., Ltd.

EO Technics Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Excimer Laser Annealing / Laser Crystallization Equipment market?

What factors are driving Excimer Laser Annealing / Laser Crystallization Equipment market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Excimer Laser Annealing / Laser Crystallization Equipment market opportunities vary by end market size?

How does Excimer Laser Annealing / Laser Crystallization Equipment break out by Type, by Application?

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