

Global Guest-Host Liquid Crystals Market Growth 2026-2032

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Abstracts

The global Guest-Host Liquid Crystals market size is predicted to grow from US\$ 68.48 million in 2025 to US\$ 233 million in 2032; it is expected to grow at a CAGR of 19.2% from 2026 to 2032.

Guest-Host Liquid Crystal (GHLC), also known as dichroic dye liquid crystal, is an electro-optical material formed by dissolving dichroic dyes with direction-selective light absorption as guest components in a nematic or cholesteric liquid crystal matrix, and adding chiral agents, stabilizers, and other functional additives according to application requirements. When an electric field is applied, the orientation of the matrix liquid crystal molecules changes, causing the dichroic dye molecules to rotate synchronously, thus altering the absorption intensity of the dye along different directions and adjusting the visible light transmittance, color depth, and shading state of the material. Its core light control mechanism is orientation absorption, rather than the refractive index mismatch and light scattering primarily relied upon by ordinary PDLCs. DNP defines GHLC as mixing special dyes into liquid crystals and controlling the transparency of the glass by changing the orientation of the liquid crystal and dye through voltage. BOE's dye-liquid crystal smart window also uses a dichroic dye liquid crystal layer and adjusts the rotation angle of the liquid crystal and dye molecules through an AC voltage below 24 volts.

Depending on the downstream device structure, Guest-Host Liquid Crystal can be directly encapsulated between glass or plastic substrates to form rigid or flexible liquid crystal cells. It can also be further combined with polymers to form composite structures such as dye-doped PDLCs and polymer-stabilized dye liquid crystals. The upstream of the industry chain includes liquid crystal monomers, dichroic dyes, chiral agents, stabilizers, and fine chemical additives. The midstream involves material companies

completing the main liquid crystal design, dye screening, mixing, purification, color calibration, and photothermal reliability verification. Downstream companies use liquid crystal filling, encapsulation, transparent electrode composites, and glass interlayer processing to create automotive dimming windows, smart building windows, rail transit windows, aviation sunshades, smart glasses, and other optical devices. Merck's Licrivision is a transparent liquid crystal mixture with added specific dye molecules, encapsulated between glass layers with a transparent conductive layer to achieve dynamic dimming.

In 2025, global Guest-Host Liquid Crystal production was approximately 125 tons, with a weighted FOB price of approximately US\$560,000 per ton, and a manufacturing gross margin of approximately 40% to 52%.

Guest-Host Liquid Crystals Enter A New Phase of Automotive Light Control And Multi-Application Expansion

The smart-dimming industry is moving beyond binary transparent-to-hazy switching toward continuous control of transmittance, color, glare, privacy, and visual comfort. Conventional PDLC benefits from established production processes and relatively low costs and is widely used in privacy partitions and architectural glazing. However, its dark state is generally milky white and is primarily designed to provide visual obscuration. Guest-Host Liquid Crystals directly modify visible-light transmission through the orientation-dependent absorption of dichroic dyes and can generate gray, black, brown, and customized colored states. They also offer the potential for low haze, rapid switching, and continuously variable dimming. As the technology expands from conventional display and optical-shutter applications into automotive, architectural, and transportation markets, competition is shifting from basic switching capability toward minimum transmittance, clear-state haze, neutral-black consistency, wide-temperature operation, and long-term reliability.

Automotive glazing represents the most significant growth opportunity. BOE's dye-doped liquid crystal light curtain has been adopted in the rear side and quarter windows of the Zeekr 009 Grand, providing ten brightness levels and an operating-temperature range from minus 20 degrees Celsius to 85 degrees Celsius. BOE's Dye Liquid Crystal Smart Window solutions have also been applied in buildings, rail transportation, and passenger vehicles, and the company participated in the development of China's national standard for electronic dye liquid crystal dimmable glass. DNP is separately developing GHLC electronic shade films for electric vehicles, focusing on neutral dark states, low-voltage switching, privacy protection, and curved-surface compatibility.

These developments indicate that Guest-Host Liquid Crystal technology is moving from architectural demonstrations and specialized optical applications toward automotive original-equipment programs. Future adoption may expand from panoramic roofs to side windows, quarter windows, cabin partitions, electronic sun visors, and transparent-display background layers.

The principal constraints on market expansion are material reliability and value-chain coordination. Neutral-black formulations generally require several dichroic dyes whose solubility, dichroic ratio, photostability, and temperature response must be matched with the host liquid crystal. Prolonged ultraviolet exposure, thermal cycling, humidity, and repeated electrical operation may cause dye degradation, color drift, precipitation, or batch inconsistency. Automotive programs also require coordinated development among material suppliers, liquid crystal cell and film manufacturers, conductive-electrode suppliers, glass processors, controller manufacturers, and vehicle makers. Market value is therefore expected to concentrate among integrated material platforms capable of host-liquid-crystal design, dichroic dye selection, stabilizer development, reference-device testing, and joint customer engineering. Guest-Host Liquid Crystals are unlikely to replace PDLC, SPD, or electrochromic technologies across all applications. Instead, they are positioned to capture applications requiring low haze, neutral dark states, rapid switching, continuous dimming, and relatively low operating voltage.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Guest-Host Liquid Crystals 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 Guest-Host Liquid Crystals portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Guest-Host Liquid Crystals market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Guest-Host Liquid Crystals 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 Guest-Host Liquid Crystals.

This report presents a comprehensive overview, market shares, and growth opportunities of Guest-Host Liquid Crystals market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Neutral Black and Gray

Blue and Brown

Other Chromatic Colors

Segmentation by Performance Grade:

Automotive Grade

Consumer Grade

Architectural Grade

Others

Segmentation by Dark-State Visible Light Transmittance:

5% and Below

Above 5% To 15%

Above 15% To 30%

Above 30%

Segmentation by Application:

Automotive

Architecture

Smart Eyewear and Consumer Optics

Others

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.

Merck KGaA

AlphaMicron

Shijiazhuang Chengzhi Yonghua Display Materials Co., Ltd.

PhiChem Corporation

Jiangsu Creative Electronic Chemicals Co., Ltd.

Beijing Bayi Space LCD Technology Co., Ltd.

Yantai Xianhua Technology Group Co., Ltd.

Chongqing Halation Precision Technology Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Guest-Host Liquid Crystals market?

What factors are driving Guest-Host Liquid Crystals market growth, globally and by region?

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

How do Guest-Host Liquid Crystals market opportunities vary by end market size?

How does Guest-Host Liquid Crystals break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Guest-Host Liquid Crystals Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Guest-Host Liquid Crystals by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Guest-Host Liquid Crystals by Country/Region, 2021, 2025 & 2032
- 2.2 Guest-Host Liquid Crystals Segment by Type
 - 2.2.1 Neutral Black and Gray
 - 2.2.2 Blue and Brown
 - 2.2.3 Other Chromatic Colors
 - 2.2.4 Guest-Host Liquid Crystals Sales by Type
 - 2.2.4.1 Global Guest-Host Liquid Crystals Sales Market Share by Type (2021-2026)
 - 2.2.4.2 Global Guest-Host Liquid Crystals Revenue and Market Share by Type (2021-2026)
 - 2.2.4.3 Global Guest-Host Liquid Crystals Sale Price by Type (2021-2026)
- 2.3 Guest-Host Liquid Crystals Segment by Performance Grade
 - 2.3.1 Automotive Grade
 - 2.3.2 Consumer Grade
 - 2.3.3 Architectural Grade
 - 2.3.4 Others
 - 2.3.5 Guest-Host Liquid Crystals Sales by Performance Grade
 - 2.3.5.1 Global Guest-Host Liquid Crystals Sales Market Share by Performance Grade (2021-2026)
 - 2.3.5.2 Global Guest-Host Liquid Crystals Revenue and Market Share by

Performance Grade (2021-2026)

2.3.5.3 Global Guest-Host Liquid Crystals Sale Price by Performance Grade (2021-2026)

2.4 Guest-Host Liquid Crystals Segment by Dark-State Visible Light Transmittance

2.4.1 5% and Below

2.4.2 Above 5% To 15%

2.4.3 Above 15% To 30%

2.4.4 Above 30%

2.4.5 Guest-Host Liquid Crystals Sales by Dark-State Visible Light Transmittance

2.4.5.1 Global Guest-Host Liquid Crystals Sales Market Share by Dark-State Visible Light Transmittance (2021-2026)

2.4.5.2 Global Guest-Host Liquid Crystals Revenue and Market Share by Dark-State Visible Light Transmittance (2021-2026)

2.4.5.3 Global Guest-Host Liquid Crystals Sale Price by Dark-State Visible Light Transmittance (2021-2026)

2.5 Guest-Host Liquid Crystals Segment by Application

2.5.1 Automotive

2.5.2 Architecture

2.5.3 Smart Eyewear and Consumer Optics

2.5.4 Others

2.5.5 Guest-Host Liquid Crystals Sales by Application

2.5.5.1 Global Guest-Host Liquid Crystals Sale Market Share by Application (2021-2026)

2.5.5.2 Global Guest-Host Liquid Crystals Revenue and Market Share by Application (2021-2026)

2.5.5.3 Global Guest-Host Liquid Crystals Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Guest-Host Liquid Crystals Breakdown Data by Company

3.1.1 Global Guest-Host Liquid Crystals Annual Sales by Company (2021-2026)

3.1.2 Global Guest-Host Liquid Crystals Sales Market Share by Company (2021-2026)

3.2 Global Guest-Host Liquid Crystals Annual Revenue by Company (2021-2026)

3.2.1 Global Guest-Host Liquid Crystals Revenue by Company (2021-2026)

3.2.2 Global Guest-Host Liquid Crystals Revenue Market Share by Company (2021-2026)

3.3 Global Guest-Host Liquid Crystals Sale Price by Company

3.4 Key Manufacturers Guest-Host Liquid Crystals Producing Area Distribution, Sales Area, Product Type

- 3.4.1 Key Manufacturers Guest-Host Liquid Crystals Product Location Distribution
- 3.4.2 Players Guest-Host Liquid Crystals Products Offered
- 3.5 Market Concentration Rate Analysis
 - 3.5.1 Competition Landscape Analysis
 - 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR GUEST-HOST LIQUID CRYSTALS BY GEOGRAPHIC REGION

- 4.1 World Historic Guest-Host Liquid Crystals Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global Guest-Host Liquid Crystals Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global Guest-Host Liquid Crystals Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Guest-Host Liquid Crystals Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Guest-Host Liquid Crystals Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Guest-Host Liquid Crystals Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Guest-Host Liquid Crystals Sales Growth
- 4.4 APAC Guest-Host Liquid Crystals Sales Growth
- 4.5 Europe Guest-Host Liquid Crystals Sales Growth
- 4.6 Middle East & Africa Guest-Host Liquid Crystals Sales Growth

5 AMERICAS

- 5.1 Americas Guest-Host Liquid Crystals Sales by Country
 - 5.1.1 Americas Guest-Host Liquid Crystals Sales by Country (2021-2026)
 - 5.1.2 Americas Guest-Host Liquid Crystals Revenue by Country (2021-2026)
- 5.2 Americas Guest-Host Liquid Crystals Sales by Type (2021-2026)
- 5.3 Americas Guest-Host Liquid Crystals Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

6.1 APAC Guest-Host Liquid Crystals Sales by Region

6.1.1 APAC Guest-Host Liquid Crystals Sales by Region (2021-2026)

6.1.2 APAC Guest-Host Liquid Crystals Revenue by Region (2021-2026)

6.2 APAC Guest-Host Liquid Crystals Sales by Type (2021-2026)

6.3 APAC Guest-Host Liquid Crystals Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Guest-Host Liquid Crystals by Country

7.1.1 Europe Guest-Host Liquid Crystals Sales by Country (2021-2026)

7.1.2 Europe Guest-Host Liquid Crystals Revenue by Country (2021-2026)

7.2 Europe Guest-Host Liquid Crystals Sales by Type (2021-2026)

7.3 Europe Guest-Host Liquid Crystals Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Guest-Host Liquid Crystals by Country

8.1.1 Middle East & Africa Guest-Host Liquid Crystals Sales by Country (2021-2026)

8.1.2 Middle East & Africa Guest-Host Liquid Crystals Revenue by Country (2021-2026)

8.2 Middle East & Africa Guest-Host Liquid Crystals Sales by Type (2021-2026)

8.3 Middle East & Africa Guest-Host Liquid Crystals Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Guest-Host Liquid Crystals

10.3 Manufacturing Process Analysis of Guest-Host Liquid Crystals

10.4 Industry Chain Structure of Guest-Host Liquid Crystals

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Guest-Host Liquid Crystals Distributors

11.3 Guest-Host Liquid Crystals Customer

12 WORLD FORECAST REVIEW FOR GUEST-HOST LIQUID CRYSTALS BY GEOGRAPHIC REGION

12.1 Global Guest-Host Liquid Crystals Market Size Forecast by Region

12.1.1 Global Guest-Host Liquid Crystals Forecast by Region (2027-2032)

12.1.2 Global Guest-Host Liquid Crystals Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Guest-Host Liquid Crystals Forecast by Type (2027-2032)

12.7 Global Guest-Host Liquid Crystals Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Merck KGaA

13.1.1 Merck KGaA Company Information

13.1.2 Merck KGaA Guest-Host Liquid Crystals Product Portfolios and Specifications

13.1.3 Merck KGaA Guest-Host Liquid Crystals Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Merck KGaA Main Business Overview

13.1.5 Merck KGaA Latest Developments

13.2 AlphaMicron

13.2.1 AlphaMicron Company Information

13.2.2 AlphaMicron Guest-Host Liquid Crystals Product Portfolios and Specifications

13.2.3 AlphaMicron Guest-Host Liquid Crystals Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 AlphaMicron Main Business Overview

13.2.5 AlphaMicron Latest Developments

13.3 Shijiazhuang Chengzhi Yonghua Display Materials Co., Ltd.

13.3.1 Shijiazhuang Chengzhi Yonghua Display Materials Co., Ltd. Company Information

13.3.2 Shijiazhuang Chengzhi Yonghua Display Materials Co., Ltd. Guest-Host Liquid Crystals Product Portfolios and Specifications

13.3.3 Shijiazhuang Chengzhi Yonghua Display Materials Co., Ltd. Guest-Host Liquid Crystals Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Shijiazhuang Chengzhi Yonghua Display Materials Co., Ltd. Main Business Overview

13.3.5 Shijiazhuang Chengzhi Yonghua Display Materials Co., Ltd. Latest Developments

13.4 PhiChem Corporation

13.4.1 PhiChem Corporation Company Information

13.4.2 PhiChem Corporation Guest-Host Liquid Crystals Product Portfolios and Specifications

13.4.3 PhiChem Corporation Guest-Host Liquid Crystals Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 PhiChem Corporation Main Business Overview

13.4.5 PhiChem Corporation Latest Developments

13.5 Jiangsu Creative Electronic Chemicals Co., Ltd.

13.5.1 Jiangsu Creative Electronic Chemicals Co., Ltd. Company Information

13.5.2 Jiangsu Creative Electronic Chemicals Co., Ltd. Guest-Host Liquid Crystals Product Portfolios and Specifications

13.5.3 Jiangsu Creative Electronic Chemicals Co., Ltd. Guest-Host Liquid Crystals

Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Jiangsu Creative Electronic Chemicals Co., Ltd. Main Business Overview

13.5.5 Jiangsu Creative Electronic Chemicals Co., Ltd. Latest Developments

13.6 Beijing Bayi Space LCD Technology Co., Ltd.

13.6.1 Beijing Bayi Space LCD Technology Co., Ltd. Company Information

13.6.2 Beijing Bayi Space LCD Technology Co., Ltd. Guest-Host Liquid Crystals

Product Portfolios and Specifications

13.6.3 Beijing Bayi Space LCD Technology Co., Ltd. Guest-Host Liquid Crystals Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Beijing Bayi Space LCD Technology Co., Ltd. Main Business Overview

13.6.5 Beijing Bayi Space LCD Technology Co., Ltd. Latest Developments

13.7 Yantai Xianhua Technology Group Co., Ltd.

13.7.1 Yantai Xianhua Technology Group Co., Ltd. Company Information

13.7.2 Yantai Xianhua Technology Group Co., Ltd. Guest-Host Liquid Crystals Product

Portfolios and Specifications

13.7.3 Yantai Xianhua Technology Group Co., Ltd. Guest-Host Liquid Crystals Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Yantai Xianhua Technology Group Co., Ltd. Main Business Overview

13.7.5 Yantai Xianhua Technology Group Co., Ltd. Latest Developments

13.8 Chongqing Halation Precision Technology Co., Ltd.

13.8.1 Chongqing Halation Precision Technology Co., Ltd. Company Information

13.8.2 Chongqing Halation Precision Technology Co., Ltd. Guest-Host Liquid Crystals

Product Portfolios and Specifications

13.8.3 Chongqing Halation Precision Technology Co., Ltd. Guest-Host Liquid Crystals Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Chongqing Halation Precision Technology Co., Ltd. Main Business Overview

13.8.5 Chongqing Halation Precision Technology Co., Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Guest-Host Liquid Crystals Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Guest-Host Liquid Crystals Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Neutral Black and Gray
- Table 4. Major Players of Blue and Brown
- Table 5. Major Players of Other Chromatic Colors
- Table 6. Global Guest-Host Liquid Crystals Sales by Type (2021-2026) & (Tons)
- Table 7. Global Guest-Host Liquid Crystals Sales Market Share by Type (2021-2026)
- Table 8. Global Guest-Host Liquid Crystals Revenue by Type (2021-2026) & (\$ million)
- Table 9. Global Guest-Host Liquid Crystals Revenue Market Share by Type (2021-2026)
- Table 10. Global Guest-Host Liquid Crystals Sale Price by Type (2021-2026) & (US\$/Ton)
- Table 11. Major Players of Automotive Grade
- Table 12. Major Players of Consumer Grade
- Table 13. Major Players of Architectural Grade
- Table 14. Major Players of Others
- Table 15. Global Guest-Host Liquid Crystals Sales by Performance Grade (2021-2026) & (Tons)
- Table 16. Global Guest-Host Liquid Crystals Sales Market Share by Performance Grade (2021-2026)
- Table 17. Global Guest-Host Liquid Crystals Revenue by Performance Grade (2021-2026) & (\$ million)
- Table 18. Global Guest-Host Liquid Crystals Revenue Market Share by Performance Grade (2021-2026)
- Table 19. Global Guest-Host Liquid Crystals Sale Price by Performance Grade (2021-2026) & (US\$/Ton)
- Table 20. Major Players of 5% and Below
- Table 21. Major Players of Above 5% To 15%
- Table 22. Major Players of Above 15% To 30%
- Table 23. Major Players of Above 30%
- Table 24. Global Guest-Host Liquid Crystals Sales by Dark-State Visible Light Transmittance (2021-2026) & (Tons)
- Table 25. Global Guest-Host Liquid Crystals Sales Market Share by Dark-State Visible

Light Transmittance (2021-2026)

Table 26. Global Guest-Host Liquid Crystals Revenue by Dark-State Visible Light Transmittance (2021-2026) & (\$ million)

Table 27. Global Guest-Host Liquid Crystals Revenue Market Share by Dark-State Visible Light Transmittance (2021-2026)

Table 28. Global Guest-Host Liquid Crystals Sale Price by Dark-State Visible Light Transmittance (2021-2026) & (US\$/Ton)

Table 29. Global Guest-Host Liquid Crystals Sale by Application (2021-2026) & (Tons)

Table 30. Global Guest-Host Liquid Crystals Sale Market Share by Application (2021-2026)

Table 31. Global Guest-Host Liquid Crystals Revenue by Application (2021-2026) & (\$ million)

Table 32. Global Guest-Host Liquid Crystals Revenue Market Share by Application (2021-2026)

Table 33. Global Guest-Host Liquid Crystals Sale Price by Application (2021-2026) & (US\$/Ton)

Table 34. Global Guest-Host Liquid Crystals Sales by Company (2021-2026) & (Tons)

Table 35. Global Guest-Host Liquid Crystals Sales Market Share by Company (2021-2026)

Table 36. Global Guest-Host Liquid Crystals Revenue by Company (2021-2026) & (\$ millions)

Table 37. Global Guest-Host Liquid Crystals Revenue Market Share by Company (2021-2026)

Table 38. Global Guest-Host Liquid Crystals Sale Price by Company (2021-2026) & (US\$/Ton)

Table 39. Key Manufacturers Guest-Host Liquid Crystals Producing Area Distribution and Sales Area

Table 40. Players Guest-Host Liquid Crystals Products Offered

Table 41. Guest-Host Liquid Crystals Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 42. New Products and Potential Entrants

Table 43. Market M&A Activity & Strategy

Table 44. Global Guest-Host Liquid Crystals Sales by Geographic Region (2021-2026) & (Tons)

Table 45. Global Guest-Host Liquid Crystals Sales Market Share Geographic Region (2021-2026)

Table 46. Global Guest-Host Liquid Crystals Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 47. Global Guest-Host Liquid Crystals Revenue Market Share by Geographic

Region (2021-2026)

Table 48. Global Guest-Host Liquid Crystals Sales by Country/Region (2021-2026) & (Tons)

Table 49. Global Guest-Host Liquid Crystals Sales Market Share by Country/Region (2021-2026)

Table 50. Global Guest-Host Liquid Crystals Revenue by Country/Region (2021-2026) & (\$ millions)

Table 51. Global Guest-Host Liquid Crystals Revenue Market Share by Country/Region (2021-2026)

Table 52. Americas Guest-Host Liquid Crystals Sales by Country (2021-2026) & (Tons)

Table 53. Americas Guest-Host Liquid Crystals Sales Market Share by Country (2021-2026)

Table 54. Americas Guest-Host Liquid Crystals Revenue by Country (2021-2026) & (\$ millions)

Table 55. Americas Guest-Host Liquid Crystals Sales by Type (2021-2026) & (Tons)

Table 56. Americas Guest-Host Liquid Crystals Sales by Application (2021-2026) & (Tons)

Table 57. APAC Guest-Host Liquid Crystals Sales by Region (2021-2026) & (Tons)

Table 58. APAC Guest-Host Liquid Crystals Sales Market Share by Region (2021-2026)

Table 59. APAC Guest-Host Liquid Crystals Revenue by Region (2021-2026) & (\$ millions)

Table 60. APAC Guest-Host Liquid Crystals Sales by Type (2021-2026) & (Tons)

Table 61. APAC Guest-Host Liquid Crystals Sales by Application (2021-2026) & (Tons)

Table 62. Europe Guest-Host Liquid Crystals Sales by Country (2021-2026) & (Tons)

Table 63. Europe Guest-Host Liquid Crystals Revenue by Country (2021-2026) & (\$ millions)

Table 64. Europe Guest-Host Liquid Crystals Sales by Type (2021-2026) & (Tons)

Table 65. Europe Guest-Host Liquid Crystals Sales by Application (2021-2026) & (Tons)

Table 66. Middle East & Africa Guest-Host Liquid Crystals Sales by Country (2021-2026) & (Tons)

Table 67. Middle East & Africa Guest-Host Liquid Crystals Revenue Market Share by Country (2021-2026)

Table 68. Middle East & Africa Guest-Host Liquid Crystals Sales by Type (2021-2026) & (Tons)

Table 69. Middle East & Africa Guest-Host Liquid Crystals Sales by Application (2021-2026) & (Tons)

Table 70. Key Market Drivers & Growth Opportunities of Guest-Host Liquid Crystals

Table 71. Key Market Challenges & Risks of Guest-Host Liquid Crystals

Table 72. Key Industry Trends of Guest-Host Liquid Crystals

Table 73. Guest-Host Liquid Crystals Raw Material

Table 74. Key Suppliers of Raw Materials

Table 75. Guest-Host Liquid Crystals Distributors List

Table 76. Guest-Host Liquid Crystals Customer List

Table 77. Global Guest-Host Liquid Crystals Sales Forecast by Region (2027-2032) & (Tons)

Table 78. Global Guest-Host Liquid Crystals Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 79. Americas Guest-Host Liquid Crystals Sales Forecast by Country (2027-2032) & (Tons)

Table 80. Americas Guest-Host Liquid Crystals Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 81. APAC Guest-Host Liquid Crystals Sales Forecast by Region (2027-2032) & (Tons)

Table 82. APAC Guest-Host Liquid Crystals Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 83. Europe Guest-Host Liquid Crystals Sales Forecast by Country (2027-2032) & (Tons)

Table 84. Europe Guest-Host Liquid Crystals Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 85. Middle East & Africa Guest-Host Liquid Crystals Sales Forecast by Country (2027-2032) & (Tons)

Table 86. Middle East & Africa Guest-Host Liquid Crystals Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 87. Global Guest-Host Liquid Crystals Sales Forecast by Type (2027-2032) & (Tons)

Table 88. Global Guest-Host Liquid Crystals Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 89. Global Guest-Host Liquid Crystals Sales Forecast by Application (2027-2032) & (Tons)

Table 90. Global Guest-Host Liquid Crystals Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 91. Merck KGaA Basic Information, Guest-Host Liquid Crystals Manufacturing Base, Sales Area and Its Competitors

Table 92. Merck KGaA Guest-Host Liquid Crystals Product Portfolios and Specifications

Table 93. Merck KGaA Guest-Host Liquid Crystals Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 94. Merck KGaA Main Business

Table 95. Merck KGaA Latest Developments

Table 96. AlphaMicron Basic Information, Guest-Host Liquid Crystals Manufacturing Base, Sales Area and Its Competitors

Table 97. AlphaMicron Guest-Host Liquid Crystals Product Portfolios and Specifications

Table 98. AlphaMicron Guest-Host Liquid Crystals Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 99. AlphaMicron Main Business

Table 100. AlphaMicron Latest Developments

Table 101. Shijiazhuang Chengzhi Yonghua Display Materials Co., Ltd. Basic Information, Guest-Host Liquid Crystals Manufacturing Base, Sales Area and Its Competitors

Table 102. Shijiazhuang Chengzhi Yonghua Display Materials Co., Ltd. Guest-Host Liquid Crystals Product Portfolios and Specifications

Table 103. Shijiazhuang Chengzhi Yonghua Display Materials Co., Ltd. Guest-Host Liquid Crystals Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 104. Shijiazhuang Chengzhi Yonghua Display Materials Co., Ltd. Main Business

Table 105. Shijiazhuang Chengzhi Yonghua Display Materials Co., Ltd. Latest Developments

Table 106. PhiChem Corporation Basic Information, Guest-Host Liquid Crystals Manufacturing Base, Sales Area and Its Competitors

Table 107. PhiChem Corporation Guest-Host Liquid Crystals Product Portfolios and Specifications

Table 108. PhiChem Corporation Guest-Host Liquid Crystals Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 109. PhiChem Corporation Main Business

Table 110. PhiChem Corporation Latest Developments

Table 111. Jiangsu Creative Electronic Chemicals Co., Ltd. Basic Information, Guest-Host Liquid Crystals Manufacturing Base, Sales Area and Its Competitors

Table 112. Jiangsu Creative Electronic Chemicals Co., Ltd. Guest-Host Liquid Crystals Product Portfolios and Specifications

Table 113. Jiangsu Creative Electronic Chemicals Co., Ltd. Guest-Host Liquid Crystals Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 114. Jiangsu Creative Electronic Chemicals Co., Ltd. Main Business

Table 115. Jiangsu Creative Electronic Chemicals Co., Ltd. Latest Developments

Table 116. Beijing Bayi Space LCD Technology Co., Ltd. Basic Information, Guest-Host Liquid Crystals Manufacturing Base, Sales Area and Its Competitors

Table 117. Beijing Bayi Space LCD Technology Co., Ltd. Guest-Host Liquid Crystals Product Portfolios and Specifications

Table 118. Beijing Bayi Space LCD Technology Co., Ltd. Guest-Host Liquid Crystals

Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 119. Beijing Bayi Space LCD Technology Co., Ltd. Main Business

Table 120. Beijing Bayi Space LCD Technology Co., Ltd. Latest Developments

Table 121. Yantai Xianhua Technology Group Co., Ltd. Basic Information, Guest-Host Liquid Crystals Manufacturing Base, Sales Area and Its Competitors

Table 122. Yantai Xianhua Technology Group Co., Ltd. Guest-Host Liquid Crystals Product Portfolios and Specifications

Table 123. Yantai Xianhua Technology Group Co., Ltd. Guest-Host Liquid Crystals Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 124. Yantai Xianhua Technology Group Co., Ltd. Main Business

Table 125. Yantai Xianhua Technology Group Co., Ltd. Latest Developments

Table 126. Chongqing Halation Precision Technology Co., Ltd. Basic Information, Guest-Host Liquid Crystals Manufacturing Base, Sales Area and Its Competitors

Table 127. Chongqing Halation Precision Technology Co., Ltd. Guest-Host Liquid Crystals Product Portfolios and Specifications

Table 128. Chongqing Halation Precision Technology Co., Ltd. Guest-Host Liquid Crystals Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 129. Chongqing Halation Precision Technology Co., Ltd. Main Business

Table 130. Chongqing Halation Precision Technology Co., Ltd. Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Picture of Guest-Host Liquid Crystals

Figure 2. Guest-Host Liquid Crystals Report Years Considered

Figure 3. Research Objectives

Figure 4. Research Methodology

Figure 5. Research Process and Data Source

Figure 6. Global Guest-Host Liquid Crystals Sales Growth Rate 2021-2032 (Tons)

Figure 7. Global Guest-Host Liquid Crystals Revenue Growth Rate 2021-2032 (\$ millions)

Figure 8. Guest-Host Liquid Crystals Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 9. Guest-Host Liquid Crystals Sales Market Share by Country/Region (2025)

Figure 10. Guest-Host Liquid Crystals Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 11. Product Picture of Neutral Black and Gray

Figure 12. Product Picture of Blue and Brown

Figure 13. Product Picture of Other Chromatic Colors

Figure 14. Global Guest-Host Liquid Crystals Sales Market Share by Type in 2026

Figure 15. Global Guest-Host Liquid Crystals Revenue Market Share by Type (2021-2026)

Figure 16. Product Picture of Automotive Grade

Figure 17. Product Picture of Consumer Grade

Figure 18. Product Picture of Architectural Grade

Figure 19. Product Picture of Others

Figure 20. Global Guest-Host Liquid Crystals Sales Market Share by Performance Grade in 2026

Figure 21. Global Guest-Host Liquid Crystals Revenue Market Share by Performance Grade (2021-2026)

Figure 22. Product Picture of 5% and Below

Figure 23. Product Picture of Above 5% To 15%

Figure 24. Product Picture of Above 15% To 30%

Figure 25. Product Picture of Above 30%

Figure 26. Global Guest-Host Liquid Crystals Sales Market Share by Dark-State Visible Light Transmittance in 2026

Figure 27. Global Guest-Host Liquid Crystals Revenue Market Share by Dark-State Visible Light Transmittance (2021-2026)

- Figure 28. Guest-Host Liquid Crystals Consumed in Automotive
- Figure 29. Global Guest-Host Liquid Crystals Market: Automotive (2021-2026) & (Tons)
- Figure 30. Guest-Host Liquid Crystals Consumed in Architecture
- Figure 31. Global Guest-Host Liquid Crystals Market: Architecture (2021-2026) & (Tons)
- Figure 32. Guest-Host Liquid Crystals Consumed in Smart Eyewear and Consumer Optics
- Figure 33. Global Guest-Host Liquid Crystals Market: Smart Eyewear and Consumer Optics (2021-2026) & (Tons)
- Figure 34. Guest-Host Liquid Crystals Consumed in Others
- Figure 35. Global Guest-Host Liquid Crystals Market: Others (2021-2026) & (Tons)
- Figure 36. Global Guest-Host Liquid Crystals Sale Market Share by Application (2025)
- Figure 37. Global Guest-Host Liquid Crystals Revenue Market Share by Application in 2025
- Figure 38. Guest-Host Liquid Crystals Sales by Company in 2025 (Tons)
- Figure 39. Global Guest-Host Liquid Crystals Sales Market Share by Company in 2025
- Figure 40. Guest-Host Liquid Crystals Revenue by Company in 2025 (\$ millions)
- Figure 41. Global Guest-Host Liquid Crystals Revenue Market Share by Company in 2025
- Figure 42. Global Guest-Host Liquid Crystals Sales Market Share by Geographic Region (2021-2026)
- Figure 43. Global Guest-Host Liquid Crystals Revenue Market Share by Geographic Region in 2025
- Figure 44. Americas Guest-Host Liquid Crystals Sales 2021-2026 (Tons)
- Figure 45. Americas Guest-Host Liquid Crystals Revenue 2021-2026 (\$ millions)
- Figure 46. APAC Guest-Host Liquid Crystals Sales 2021-2026 (Tons)
- Figure 47. APAC Guest-Host Liquid Crystals Revenue 2021-2026 (\$ millions)
- Figure 48. Europe Guest-Host Liquid Crystals Sales 2021-2026 (Tons)
- Figure 49. Europe Guest-Host Liquid Crystals Revenue 2021-2026 (\$ millions)
- Figure 50. Middle East & Africa Guest-Host Liquid Crystals Sales 2021-2026 (Tons)
- Figure 51. Middle East & Africa Guest-Host Liquid Crystals Revenue 2021-2026 (\$ millions)
- Figure 52. Americas Guest-Host Liquid Crystals Sales Market Share by Country in 2025
- Figure 53. Americas Guest-Host Liquid Crystals Revenue Market Share by Country (2021-2026)
- Figure 54. Americas Guest-Host Liquid Crystals Sales Market Share by Type (2021-2026)
- Figure 55. Americas Guest-Host Liquid Crystals Sales Market Share by Application (2021-2026)
- Figure 56. United States Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$

millions)

Figure 57. Canada Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$ millions)

Figure 58. Mexico Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$ millions)

Figure 59. Brazil Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$ millions)

Figure 60. APAC Guest-Host Liquid Crystals Sales Market Share by Region in 2025

Figure 61. APAC Guest-Host Liquid Crystals Revenue Market Share by Region
(2021-2026)

Figure 62. APAC Guest-Host Liquid Crystals Sales Market Share by Type (2021-2026)

Figure 63. APAC Guest-Host Liquid Crystals Sales Market Share by Application
(2021-2026)

Figure 64. China Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$ millions)

Figure 65. Japan Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$ millions)

Figure 66. South Korea Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$
millions)

Figure 67. Southeast Asia Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$
millions)

Figure 68. India Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$ millions)

Figure 69. Australia Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$ millions)

Figure 70. China Taiwan Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$
millions)

Figure 71. Europe Guest-Host Liquid Crystals Sales Market Share by Country in 2025

Figure 72. Europe Guest-Host Liquid Crystals Revenue Market Share by Country
(2021-2026)

Figure 73. Europe Guest-Host Liquid Crystals Sales Market Share by Type (2021-2026)

Figure 74. Europe Guest-Host Liquid Crystals Sales Market Share by Application
(2021-2026)

Figure 75. Germany Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$
millions)

Figure 76. France Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$ millions)

Figure 77. UK Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$ millions)

Figure 78. Italy Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$ millions)

Figure 79. Russia Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$ millions)

Figure 80. Middle East & Africa Guest-Host Liquid Crystals Sales Market Share by
Country (2021-2026)

Figure 81. Middle East & Africa Guest-Host Liquid Crystals Sales Market Share by Type
(2021-2026)

Figure 82. Middle East & Africa Guest-Host Liquid Crystals Sales Market Share by
Application (2021-2026)

Figure 83. Egypt Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$ millions)

Figure 84. South Africa Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$ millions)

Figure 85. Israel Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$ millions)

Figure 86. Turkey Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$ millions)

Figure 87. GCC Countries Guest-Host Liquid Crystals Revenue Growth 2021-2026 (\$ millions)

Figure 88. Manufacturing Cost Structure Analysis of Guest-Host Liquid Crystals in 2026

Figure 89. Manufacturing Process Analysis of Guest-Host Liquid Crystals

Figure 90. Industry Chain Structure of Guest-Host Liquid Crystals

Figure 91. Channels of Distribution

Figure 92. Global Guest-Host Liquid Crystals Sales Market Forecast by Region (2027-2032)

Figure 93. Global Guest-Host Liquid Crystals Revenue Market Share Forecast by Region (2027-2032)

Figure 94. Global Guest-Host Liquid Crystals Sales Market Share Forecast by Type (2027-2032)

Figure 95. Global Guest-Host Liquid Crystals Revenue Market Share Forecast by Type (2027-2032)

Figure 96. Global Guest-Host Liquid Crystals Sales Market Share Forecast by Application (2027-2032)

Figure 97. Global Guest-Host Liquid Crystals Revenue Market Share Forecast by Application (2027-2032)

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