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OLED Lighting 2015-2022: Reassessing Markets and Momentum

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Abstracts

A year ago the outlook for OLED lighting seemed to brighten a bit, anticipating that new capacity build-outs and continued development would enable higher outputs and lower costs, and finally start to unlock broad market demand. Unfortunately these efforts largely haven't panned out: LG Chem has pushed out its planned expansion, Konica Minolta did ramp but we believe with disappointing results so far, and Philips is getting out of OLED lighting (and lighting components entirely).

On the end market side of the equation, one can still find reasons to be encouraged. OLED lighting products are showing up in home improvement stores for just $200, instead of the thousands they cost just a couple of years ago. The first vehicles with OLED lighting are expected to arrive within the next 12-24 months. And there are always occasional opportunities to be found in unique showcase installations.

But the real big end-market fish for OLED lighting - office and commercial lighting, and low-cost residential - remain frustratingly elusive, still unable to broadly appreciate and embrace OLED lighting's value proposition. The issue seems to be less about technology and performance improvements, and more about persistently high costs and pricing - which is why the aforementioned manufacturing expansions and improvements (and more of them) are so critical.

The OLED lighting sector is also stuck in a loop. Manufacturers are waiting to commit until there is enough real or imminent end-market demand - but demand largely will be lured by vastly cheaper products enabled through production improvements and lower costs. The question now seems to be which strategy to embrace for the near- to mid-term: press on and believe, stand pat and wait, or give up and get out? All these cases can be made.

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This latest report from n-tech Research revisits our assumptions and expectations on the evolution of end-markets for the OLED lighting sector, evaluating the challenges still standing between OLED lighting and key end markets, especially general illumination in offices and low-cost residential lighting. We include eight-year (volume and value) projections for all the major market sectors along with an assessment of how OLED lighting can effectively compete with conventional lighting technologies. This report also analyzes the core strategies of leading players in the OLED lighting space, from technology development and manufacturing to key partnerships.

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ACRONYMS AND ABBREVIATIONS USED IN THIS REPORT

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