

# **Brightness Enhancement Film Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application**

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## **Abstracts**

### **Brightness Enhancement Film Market Summary**

#### **Introduction**

Brightness Enhancement Film is an optical film used to enhance brightness and light diffusion in backlighting systems, primarily for LCD TVs, laptops, monitors, and mobile phones. Its microstructure redirects light efficiently, improving display performance in consumer electronics and automotive screens. The market is shaped by key players like 3M and Kolon Industries, with emerging Chinese firms like Hefei Xinmei Material Technology gaining traction following LG Chem's 2024 sale of its polarizer film business for CNY 4.5 billion. Rising automotive screen sizes (from 5-7 inches to 10-15 inches) drive demand, though mobile phone growth slows with OLED penetration. The market is estimated at USD 0.9-1.6 billion in 2025, with a CAGR of 1.2%-2.2% from 2025 to 2030, reflecting maturity in traditional applications and modest growth in new sectors.

#### **Market Size and Growth Forecast**

The Brightness Enhancement Film market is projected to reach USD 0.9-1.6 billion in 2025, growing at a CAGR of 1.2%-2.2% through 2030. This slow growth mirrors market saturation in consumer electronics, offset by automotive opportunities.

#### **Regional Analysis**

Asia Pacific: Growth is estimated at 1.5%-2.5%, with China and South Korea leading in

display manufacturing. Trends focus on cost efficiency.

North America: The market grows at 1.0%-2.0%, with the U.S. emphasizing automotive displays.

Europe: Growth ranges from 1.2%-2.2%, led by Germany, with automotive innovation driving demand.

Rest of the World: Growth is 0.8%-1.8%, with India showing potential in electronics.

### Application Analysis

LCD TVs: Growing at 0.8%-1.8%, it remains a core use, though demand slows with OLED adoption.

Laptops & Tablets: With a growth rate of 1.0%-2.0%, it supports portable displays, trending toward slim designs.

Monitors: Growing at 1.2%-2.2%, it serves office and gaming needs, with steady demand.

Mobile Phones: Growing at 0.5%-1.5%, it faces decline due to OLED shifts.

Automotive: With a growth rate of 2.0%-3.0%, it benefits from larger screens and EV trends.

Others: Including medical displays, this grows at 1.0%-2.0%.

### Key Market Players

3M: In the U.S., 3M leads in optical film innovations.

Kolon Industries: In South Korea, it focuses on display solutions.

Hefei Xinmei: In China, it expands via LG Chem's acquisition.

Ningbo Exciton: In China, it targets optical films.

Zhejiang Nanyang: In China, it serves display markets.

Jiangsu Shuangxing: In China, it focuses on plastic films.

Changzhou Huawei: In China, it supplies optical materials.

SSFC: In Taiwan, it targets synthetic fibers and films.

EFUN Technology: In Taiwan, it serves display needs.

Kangde Xin: In China, it focuses on composite materials.

Ningbo Solartron: In China, it targets optical technologies.

### Porter's Five Forces Analysis

Threat of New Entrants: Low, due to technical expertise and market maturity.

Threat of Substitutes: Moderate, with OLED reducing Brightness Enhancement Film reliance.

Bargaining Power of Buyers: High, as large display makers negotiate prices.

Bargaining Power of Suppliers: Moderate, with material supply concentrated.

Industry Rivalry: Moderate, driven by established players and Chinese growth.

### Market Opportunities and Challenges

#### Opportunities

Automotive screen size growth to 10-15 inches boosts demand.

Emerging markets offer expansion potential.

Innovations in energy-efficient displays create niches.

#### Challenges

OLED penetration in mobile phones reduces Brightness Enhancement Film use.

Market saturation in TVs and monitors limits growth.

Cost pressures from buyers challenge profitability.

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