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3D Display Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product (Volumetric Display, Stereoscopic Display, Head Mounted Display), By Technology (DLP, PDP, OLED, LED), By Application (TV, Smartphones, Monitor, Mobile Computing Devices, Projectors, Head Mounted Display (HMD), Others), By Region, By Competition, 2018-2028

https://marketpublishers.com/r/31E8E5A0F16EEN.html
Date: October 2023
Pages: 181
Price: US$ 4,900.00 (Single User License)
ID: 31E8E5A0F16EEN

Abstracts

Global 3D Display Market has valued at USD 106 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 17.8% through 2028. The Global 3D Display Market has been experiencing steady growth in recent years, driven by a confluence of technological advancements and expanding applications across various industries. With an increasing demand for immersive visual experiences, the market has witnessed a surge in adoption, particularly in sectors such as entertainment, healthcare, and automotive. In the entertainment industry, 3D displays have revolutionized the viewing experience, offering a more captivating and realistic engagement for consumers. The proliferation of 3D content, including movies, games, and virtual reality applications, has significantly contributed to market expansion.

Moreover, the healthcare sector has harnessed 3D displays for advanced medical imaging, surgical planning, and training purposes. These displays enable healthcare professionals to visualize intricate anatomical structures with precision, leading to improved diagnosis and treatment outcomes. The automotive industry is another key driver of the 3D display market, where these technologies are integrated into dashboards and heads-up displays, enhancing driver safety and infotainment features.

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Overall, the Global 3D Display Market is on a trajectory of continuous growth, fueled by innovation and an ever-expanding array of applications across diverse sectors. As technological advancements continue, the market is poised to offer even more compelling and immersive experiences to consumers and professionals alike.

Key Market Drivers

Immersive Visual Experiences

The Global 3D Display Market is experiencing remarkable growth, primarily fueled by the escalating demand for immersive visual experiences across various sectors. This surge in demand is particularly evident in industries such as entertainment, healthcare, and automotive, where 3D displays are revolutionizing the way people interact with content and information. In the entertainment sector, 3D displays are redefining the viewing experience, offering a more engaging and lifelike dimension to movies, gaming, and virtual reality applications. This immersive visual experience captivates audiences and enhances their level of engagement, resulting in a more memorable and enjoyable entertainment experience. Moreover, the healthcare industry has embraced the adoption of 3D displays, which are transforming medical imaging, surgical planning, and training processes. By providing a realistic and detailed visualization of anatomical structures, 3D displays enable healthcare professionals to make more accurate diagnoses, plan surgeries with precision, and enhance patient care. This advancement in medical technology has the potential to significantly improve patient outcomes and revolutionize the healthcare landscape. Additionally, the automotive industry is integrating 3D displays into vehicles to enhance driver safety and infotainment systems, elevating the overall driving experience. These displays provide drivers with crucial information in a more intuitive and visually appealing manner, reducing distractions and improving situational awareness. Furthermore, 3D displays in vehicles offer advanced infotainment features, allowing passengers to enjoy a more immersive and interactive entertainment experience during their journeys. The integration of 3D displays in automotive applications not only enhances the driving experience but also contributes to the overall safety and convenience of passengers. Overall, the Global 3D Display Market is witnessing significant growth as industries recognize the immense potential of 3D displays in delivering immersive visual experiences and transforming various sectors. With ongoing advancements in display technologies and increasing consumer demand for enhanced visual content, the future of the 3D display market looks promising, paving the way for more innovative applications and experiences in the years to come.

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Technological Advancements

Continuous innovation in 3D display technology is a significant driver of the global market, propelling its growth to new heights. The market is witnessing a constant stream of advancements in autostereoscopic displays, glasses-free 3D, and other cutting-edge technologies, which are revolutionizing the accessibility and affordability of 3D displays. These innovations are expanding the capabilities of the market, unlocking a broader range of applications and driving further adoption. Autostereoscopic displays, for instance, eliminate the need for special glasses, providing a more convenient and immersive viewing experience for users. This breakthrough technology has opened up new possibilities in sectors such as entertainment, gaming, and advertising, where users can now enjoy 3D content without the hassle of wearing glasses. Additionally, the development of glasses-free 3D displays has addressed one of the major barriers to widespread adoption, making 3D displays more accessible to a larger audience. These displays utilize advanced algorithms and lenticular lens technology to create a 3D effect without the need for any additional eyewear. This has not only enhanced the user experience but also reduced costs, making 3D displays more affordable for consumers and businesses alike. Furthermore, continuous innovation in 3D display technology has led to improvements in resolution, color accuracy, and viewing angles, resulting in more realistic and captivating visual experiences. These advancements have expanded the applications of 3D displays beyond traditional entertainment and gaming, finding utility in sectors such as healthcare, education, architecture, and automotive. In healthcare, for example, 3D displays are being used for medical imaging, surgical planning, and patient education, enabling healthcare professionals to visualize complex anatomical structures with greater clarity and precision. In the automotive industry, 3D displays are integrated into vehicles to enhance driver safety, navigation systems, and infotainment features, providing a more immersive and intuitive driving experience. Overall, continuous innovation in 3D display technology is driving the global market forward, unlocking new opportunities and applications across various sectors, and fueling its growth trajectory.

Content Proliferation

The 3D display market is being propelled forward by the widespread proliferation of 3D content, including movies, games, and virtual reality experiences. As the availability of immersive content continues to increase, there is a growing demand for 3D displays that can deliver these captivating experiences. This content-driven demand is a significant driving force behind the growth of the 3D display market. The entertainment industry, in particular, has witnessed a surge in the production and consumption of 3D

movies and games, with audiences seeking more immersive and visually stunning experiences. This has led to a greater need for advanced 3D display technologies that can accurately reproduce the depth and realism of the content. Additionally, the rise of virtual reality (VR) and augmented reality (AR) applications has further fueled the demand for 3D displays. VR experiences require high-quality 3D displays to create a sense of presence and immersion, while AR applications rely on 3D displays to overlay virtual objects onto the real world. As these technologies continue to evolve and gain popularity across various industries, the demand for 3D displays is expected to grow exponentially. Moreover, the increasing adoption of 3D displays in sectors such as healthcare, architecture, and education is also contributing to the market's expansion. In healthcare, for example, 3D displays are used for medical imaging and surgical planning, allowing healthcare professionals to visualize complex anatomical structures in a more detailed and accurate manner. In the field of architecture, 3D displays enable designers to showcase their projects in a more immersive and realistic way. Similarly, in education, 3D displays enhance the learning experience by providing interactive and engaging visual content. Overall, the proliferation of 3D content across various industries is driving the demand for 3D displays and propelling the market forward.

Education and Advertising

The increasing adoption of 3D technology in education and advertising is playing a significant role in driving the growth of the 3D display market. In the field of education, 3D displays are being recognized as a valuable tool for enhancing engagement and improving information retention among students. By presenting educational content in a three-dimensional format, these displays create a more immersive and interactive learning experience. Students can visualize complex concepts and objects in a realistic manner, leading to a deeper understanding and retention of the material. This has led to a growing demand for 3D displays in educational institutions, as educators seek to leverage the benefits of this technology to enhance their teaching methods and improve student outcomes.

In the advertising industry, 3D displays offer unique and attention-grabbing opportunities for brands to connect with consumers. Traditional advertising methods often struggle to capture the attention of increasingly distracted audiences. However, 3D displays provide a visually striking and immersive platform for brands to showcase their products and messages. The depth and realism offered by 3D displays create a memorable and engaging experience for viewers, making the advertising content more impactful and effective. As a result, advertisers are increasingly turning to 3D displays as a way to stand out in a crowded marketplace and leave a lasting impression on consumers.

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The adoption of 3D technology in education and advertising is driven by the desire to create more engaging and memorable experiences for students and consumers. As the benefits of 3D displays become more widely recognized, the demand for these solutions is expected to continue to rise. Educational institutions will increasingly integrate 3D displays into their classrooms, while advertisers will seek out innovative ways to leverage the power of 3D technology in their campaigns. This growing adoption of 3D technology in education and advertising is a key driver behind the expansion of the 3D display market, as it opens up new avenues for the application of this technology and drives up demand for these solutions.

Key Market Challenges

Limited Awareness and Understanding

The global 3D display market faces a significant challenge in terms of limited awareness and understanding among consumers and businesses. Many potential users are still unfamiliar with the capabilities and benefits of 3D displays, leading to slower adoption rates. Educating consumers about the immersive and engaging experiences offered by 3D displays is crucial to drive demand and market growth. Manufacturers and industry players should invest in targeted marketing campaigns, demonstrations, and educational initiatives to showcase the unique features and advantages of 3D displays, thereby increasing awareness and understanding among potential users.

High Costs and Affordability

Another challenge for the global 3D display market is the high costs associated with the technology. The production and implementation of 3D displays can be expensive, making them less accessible to a wider consumer base. Affordability is a key factor that influences the adoption of 3D displays, especially in price-sensitive markets. To overcome this challenge, manufacturers need to focus on cost optimization, exploring innovative manufacturing techniques, and economies of scale to reduce production costs. Additionally, offering flexible pricing models and financing options can make 3D displays more affordable and attractive to a broader range of customers.

Health and Safety Concerns

Health and safety concerns associated with prolonged exposure to 3D displays pose challenges for the global market. Some users may experience discomfort, eye strain, or

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headaches when viewing 3D content for extended periods. Manufacturers need to prioritize user safety by implementing measures to reduce these potential health risks. This includes optimizing display technologies to minimize eye fatigue, providing adjustable settings for personalized viewing experiences, and offering clear guidelines for safe usage. Educating users about proper viewing habits and potential risks can also help address these concerns and build trust in the technology.

Key Market Trends

Growing Demand for Advanced 3D Display Technologies

The global market for 3D displays is witnessing a surge in demand for advanced technologies that offer enhanced visual experiences. As consumers seek more immersive and captivating content, there is a growing need for 3D display solutions that can deliver superior image quality, realistic depth perception, and wider viewing angles. This demand is driven by various industries, including entertainment, gaming, advertising, and design, where the ability to showcase content in 3D can significantly enhance user engagement and impact.

Advanced 3D display technologies, such as autostereoscopic displays, holographic displays, and volumetric displays, are gaining traction in the market. These technologies eliminate the need for specialized glasses and provide a more natural and immersive viewing experience. Manufacturers are investing in research and development to improve the resolution, brightness, and color accuracy of 3D displays, pushing the boundaries of visual realism and creating new opportunities for content creators and businesses.

Industry-Specific Applications of 3D Displays

The global market is experiencing a shift towards industry-specific applications of 3D displays. Different sectors, such as healthcare, architecture, automotive, and education, have unique requirements and can benefit from tailored 3D display solutions. For example, in the healthcare industry, 3D displays are used for medical imaging, surgical planning, and patient education, allowing healthcare professionals to visualize complex anatomical structures and improve diagnostic accuracy.

Industry-specific applications of 3D displays leverage domain knowledge and specialized software to create customized visualizations and simulations. These applications enable professionals to interact with 3D models, manipulate objects in

virtual environments, and gain a deeper understanding of complex data. By providing a more intuitive and immersive experience, industry-specific 3D displays enhance productivity, decision-making, and training in various sectors.

Integration of 3D Displays with Emerging Technologies

The integration of 3D displays with emerging technologies is a significant trend in the global market. As technologies such as virtual reality (VR), augmented reality (AR), and mixed reality (MR) continue to evolve, there is a growing synergy between these immersive technologies and 3D displays. The combination of 3D displays with VR, AR, or MR technologies creates a more immersive and interactive user experience, enabling users to visualize and interact with virtual objects in three dimensions.

This integration opens up new possibilities in areas such as gaming, simulation, training, and product design. For example, in the gaming industry, the integration of 3D displays with VR technology allows players to experience games in a more realistic and immersive manner. In the design industry, architects and engineers can use AR-enabled 3D displays to visualize and manipulate virtual models in real-world environments.

The integration of 3D displays with emerging technologies not only enhances user experiences but also creates new opportunities for businesses to innovate and differentiate their products and services.

Segmental Insights

Product Insights

The stereoscopic displays segment of the 3D display market by product is estimated to occupy the largest market share during the forecast period 2023-2030. The growth of the stereoscopic segment can be attributed to high adoption in the gaming and entertainment industries for applications, including academics, movies, animations, and video games, among others. Furthermore, improvements in autostereoscopic technology and lower costs of the stereoscopic products have also contributed to the growth.

The HMD segment is expected to register the highest CAGR exceeding 22.0% during the forecast period 2023-2030, owing to its growing popularity in science, engineering, and medicine. The growth of the HMD segment can also be attributed to quick

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technological advancements and reduced prices of 3D displays. Moreover, the viewing experience offered by HMD also heavily contributed to the growth of the stereoscopic display segment in the 3D display market.

Technology Insights

Based on technology, the market is segmented into DLP, PDP, OLED, and LED. The LED segment accounted for the largest market share accounting for more than 70.0% of the 3D display market in 2022. LED panels are commonly used as backlighting solutions for enhancing image quality and getting a faster response. Several companies in the 3D display market are focused on developing LED-based displays for various applications such as TVs, monitors, smartphones, and HMDs.

The OLED technology segment is expected to record the highest CAGR exceeding 25.0% during the forecast period 2023 to 2030. The growth of OLED can be attributed to rising adoption across several devices and enhanced picture quality and performance as compared to traditional displays. Additionally, increased penetration of OLED in smartphones is another factor that fueled the OLED segment's growth in the 3D display market by technology.

Application Insights

By application, the TV segment of the 3D display market is expected to have the largest revenue in 2022. A large chunk of the growth of the TV segment can be attributed to a shift in consumer preference from going to theatres to being entertained in the comfort of home on TVs or computers, post the COVID-19 pandemic. This change encouraged TV manufacturers to add 3D displays to their product portfolios. These TVs offer a better visualization impact, offering enhanced picture quality. Consumer Electronics Manufacturers (CEMs) are promoting 3D display TVs as high-end devices with premium features driving the growth of the TV segment.

The smartphone sub-segment is also expected to have significant growth exceeding 21.0% in the 3D display market during the forecast period. The change can be attributed to high competition among smartphone vendors to offer better features to gain the smartphone market's upper hand. Moreover, the mobile gaming industry has been coming up with games that require enhanced visual graphics, which has also facilitated the growth of the smartphone segment during the forecast period.

The HMD sub-segment is expected to expand with the highest CAGR from 2023-2030.

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The growing use of HMDs and smart glasses across numerous applications in several industries accompanies the segment's growth. The visual experience HMD offers is used in multiple industries, including medical, gaming, and aeronautical. HMD catering for a wider part of the population is also among the major factors attributed to its growth in the 3D display market during the forecast period.

The smartphone sub-segment is expected to post a significant CAGR during the forecast period 2023-2030, owing to the rising technology integration in mobile devices. Changing lifestyles are driving people to buy high-end smartphones, which in turn is generating the adoption of 3D displays. However, original equipment manufacturers (OEMs) concentrate on 3D data visualization solutions for smartphones, fueling market growth.

Regional Insights

Asia Pacific region led the market and accounted for over 31.65% of the global revenue share in 2022. Technological advancements, increasing infiltration of smartphones and a high acceptance rate of digital services are the crucial aspects influencing the development of the regional market. Furthermore, the rolling demand for video games across the globe is accelerating the adoption of stereoscopic displays. Growing the use of 3D display technology in entertainment, defense, gaming, and engineering simulations will also strengthen the market throughout the forecast period.

Asia Pacific is projected to develop as the fastest-increasing region during the same period, owing to shifting customer preferences and increasing disposable household income. The presence of main technology players such as LG, Samsung Electronics, Sony Corporation, Panasonic Corporation, and Fujifilm Holdings Corporation is also assisting the growth of the Asia Pacific region in the 3D display market.

Key Market Players

AUO Corporation

BOE Technology Group Co., Ltd.

Innolux Corporation

Japan Display Inc.

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LG Electronics

SAMSUNG

SHARP CORPORATION

Sony Corporation

Truly Semiconductor Co., Ltd.

Vision ox Company

Report Scope:

In this report, the Global 3D Display Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

3D Display Market, By Product:

Volumetric Display

Stereoscopic Display

Head Mounted Display

3D Display Market, By Technology:

DLP

PDP

OLED

LED

3D Display Market, By Application:

TV

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Smartphones, Monitor

Mobile Computing Devices

Projectors

Head Mounted Display (HMD)

Others

3D Display Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Belgium

Asia-Pacific

China

India

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Japan

Australia

South Korea

Indonesia

Vietnam

South America

Brazil

Argentina

Colombia

Chile

Peru

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global 3D

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Display Market.

Available Customizations:

Global 3D Display market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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