



2026 Medium&Large Size OLED Display Annual Report

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7.6 ASP			

3. OLED Product Launch Trends

3.1 OLED TV Trend Analysis

■ Samsung Electronics

- Samsung Electronics sold a *** *** *** equipped with *** *** panels from *** in *** ***, and expanded the application to ***, ***, ***-class, ***, and *** *** in ***.
- Samsung Electronics expanded its lineup from a focus on ~-inch models to a range spanning from *** inches to *** inches.
- Among Samsung Electronics' ***-year *** TV lineup, *** panels from *** were applied to the *** high-end lineup, while *** panels from *** were used in the *** lineup, and panels from both *** and *** were mixed in the *** series.

Samsung Display의 QD-OLED 패널이 적용된 QN83S95F



LG Display의 white OLED 패널이 적용된 QN83S85F

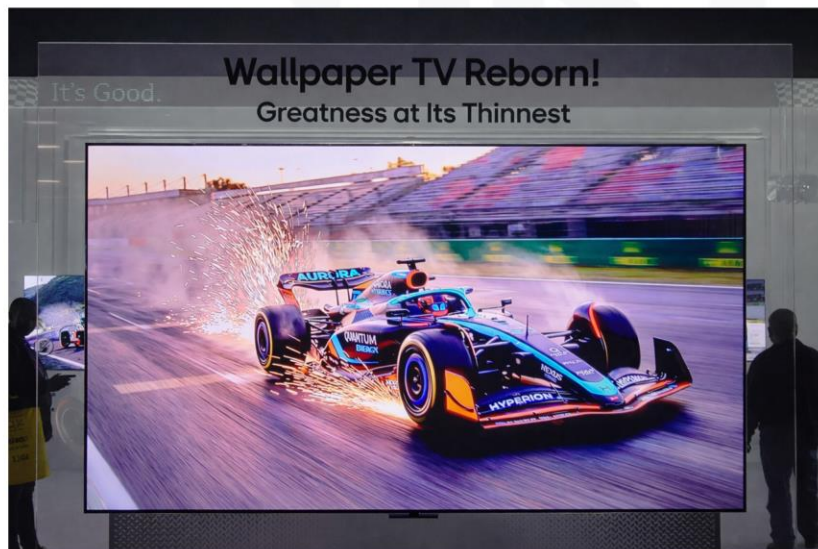


3. OLED Product Launch Trends

3.1 OLED TV Trend Analysis

LG Electronics

- LG Electronics unveiled its strategic direction for 2026 at CES.
- OLED will be maintained as the “absolute flagship,” with an emphasis on enhancing brightness and ambient light performance to redefine the premium benchmark.
- Next-generation OLED TV panels are based on the M3 architecture, with peak brightness reaching 10,000 nits. The key characteristics of the 2026 OLED lineup are M3 and M3P.
- OLED is being redefined as M3, M3P, and M3S integrated into M3 space, highlighting M3 M3P, M3 M3S M3S’s M3 M3P, and M3S.
- M3 OLED ‘M3 M3P’ was also mentioned as M3 M3P M3 M3S, reinforcing the message that OLED represents M3 M3P M3S experience.



Category	LG OLED evo W6 WALLPAPER
Product Positioning	Ultra-thin, premium OLED TV
Display Type	OLED
Panel Structure	M3
Available Sizes	42, 48, 55, 65, 77, 83, 97, 105 inches
Resolution	4K UHD, 8K UHD
Peak Brightness	10,000 nits
Refresh Rate	120Hz

4. Panel Manufacturer Trends by Application

4.1 OLED for TVs

■ LG Display

- At ***, a *** nit, ***-inch OLED TV panel incorporating *** *** *** was showcased.
- Starting from ***, a *** *** *** TV OLED *** panel to be applied to OLED TVs was also unveiled. Compared to the previous generation, ***, it reduced *** *** by ****%.

LG Display's 4th-generation OLED TV unveiled at CES 2026



27" QHD



Source: LG Display, UBI Research DB

4. Panel Manufacturer Trends by Application

4.3 OLED for Tablet PCs

■ Samsung Display

- Samsung Display’s OLED panels for tablet PCs are being supplied to ***, ***, ***, ***, ***, ***, ***, ***, and ***.
- For ***, Samsung Display supplies 11-inch *** tandem OLED panels to ***, and from ***, it has been supplying *** and *** panels.
- Single OLED panels on rigid substrates are being produced at the A2 line (5.5G), while OLED panels using the *** + *** process are currently being produced at A3 (6G).
- In 2026, Samsung Display plans to produce *** *** for Apple *** *** at the *** line.

Samsung Display’s OLED Product Status for Tablet PCs

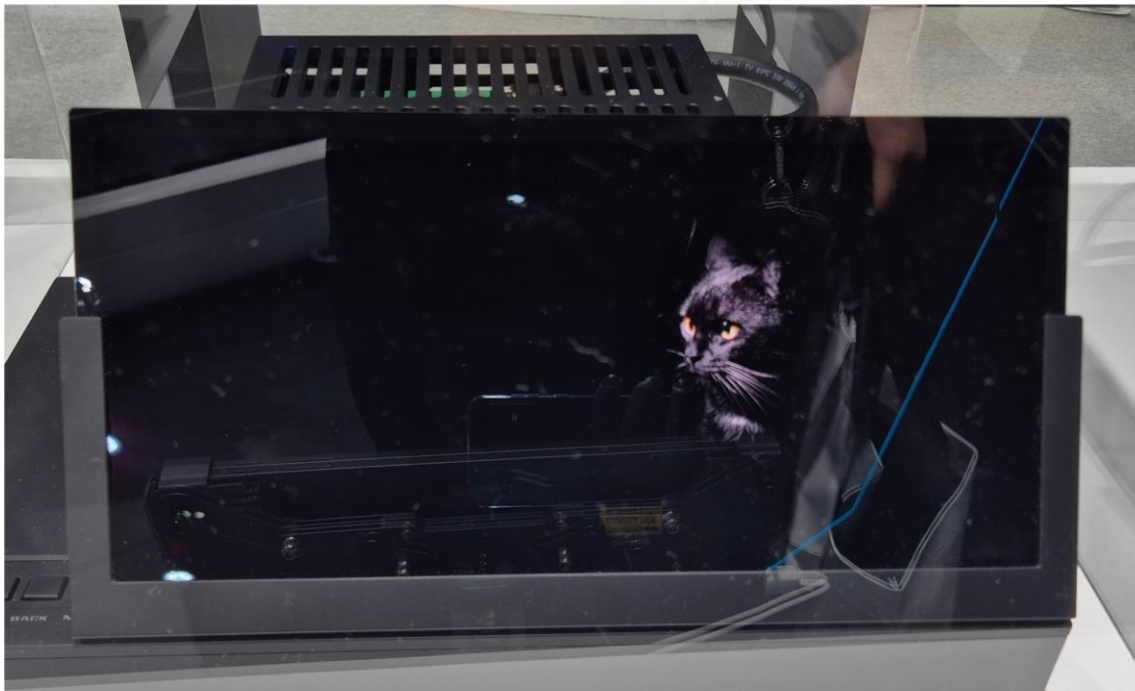
	14.6"	13.3"	12.4"	11"	11"	13"
Display Mode						
TFT Backplane						
Brightness						
Resolution						
Refresh rate [Hz]						
Main User						

4. Panel Manufacturer Trends by Application

4.3 OLED for Tablet PCs

■ Samsung Display

- Samsung Display *** a ***-inch panel incorporating FMP (Flex Magic Pixel) technology. *** features ***, and its brightness is ***.
- The *** *** *** *** of the FMP panel is less than ***% at a viewing angle of ***, resulting in minimal brightness variation even when viewed from the side.
- Products equipped with FMP panels enable a privacy mode, where the display remains clearly visible from the front while becoming invisible from the side.



4. Panel Manufacturer Trends by Application

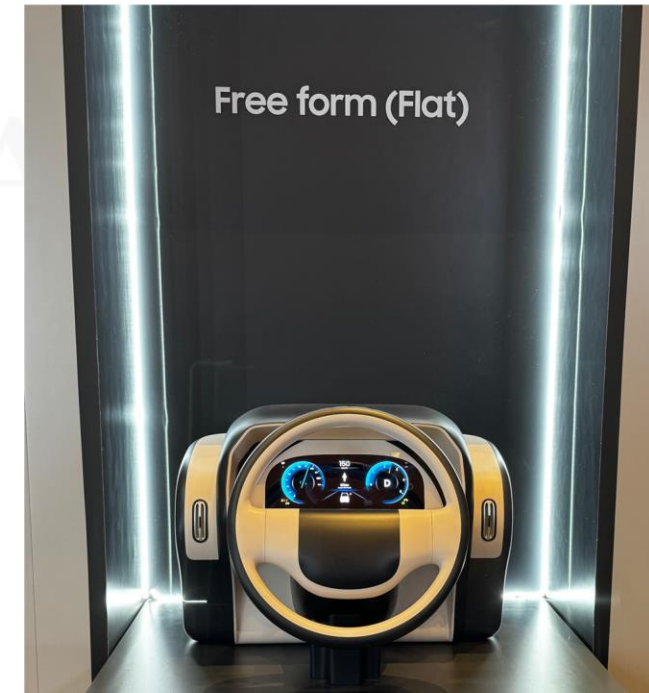
4.6 Automotive OLED

■ Samsung Display

- Samsung Display unveiled Flexible L and Free form (Flat) panels at CES 2026.
- Flexible L is a panel based on flexible OLED, while Free form (Flat) adopts rigid OLED.
- Flexible L is designed for dashboard applications, with a size of *** inches and a curvature radius of *** mm.
- Free form (Flat) has a size of *** inches and a brightness of *** nits, and is intended for *** *** applications.



Flexible L



Free form (Flat)

5. Trends in Medium- and Large-sized OLED Application Technology

5.2 COE

COE Line Status by Panel Maker

- Samsung Display is currently mass-producing the *** structure on the *** *** line and the *** *** line. BOE is also applying the same process on the *** *** line. In addition, *** is expanding the adoption of *** on ***, while *** is increasing the use of *** on the *** *** line. LG Display is also building *** facilities on the *** *** line, targeting supply in *** ***.

Manufacturer	COE Production Line	Products Applying COE	Production Scale / Status	Notes
SDC (Samsung Display)				
LGD (LG Display)				
BOE				
TCL CSOT				
Visionox				
Tianma				

6. OLED Mass Production Capacity Analysis and Outlook

6.1 Current Status of OLED Lines for IT Applications

IT OLED Demand

- *** first introduced OLED into tablets with a *** ***-inch model in *** , establishing a premium tablet lineup, and since launching the ' *** ***' series equipped with *** panels in *** ***, demand for IT OLED and related investments have been increasing.
- *** launched two tablet models, *** and ***, featuring OLED in the *** *** series starting in ***.
- *** plans to expand OLED adoption from *** in *** to tablet PCs such as ***, *** ***, and further into laptops including ***.
- In ***, *** plans to apply tandem OLED for the first time to the *** *** series, and these panels are expected to be supplied by ***.

(M pcs)

Product	Company	2024	2025	2026	2027
iPad Pro	Samsung Display				
	LG Display				
MacBook Pro	Samsung Display				

6. OLED Mass Production Capacity Analysis and Outlook

6.3 Analysis of Mass Production Capacity and Investment Timing

(1,000 sheets)

Company	Fab. Location	Gen	Backplane	OLED Method	Status	PO	2026	2027	2028	2029	2030
Samsung Display											
Samsung Display											
Samsung Display											
Samsung Display											
Samsung Display											
Samsung Display											
Samsung Display											
Samsung Display											
Samsung Display											
LG Display											
LG Display											
LG Display											
LG Display											
LG Display											
LG Display											
LG Display											
BOE											
BOE											
BOE											
BOE											
Visionox											
Visionox											
CSOT											
Everdisplay											

10. OLED Market Outlook

10.2 Market Outlook by Panel Manufacturer

■ Shipment Outlook

(M pcs)

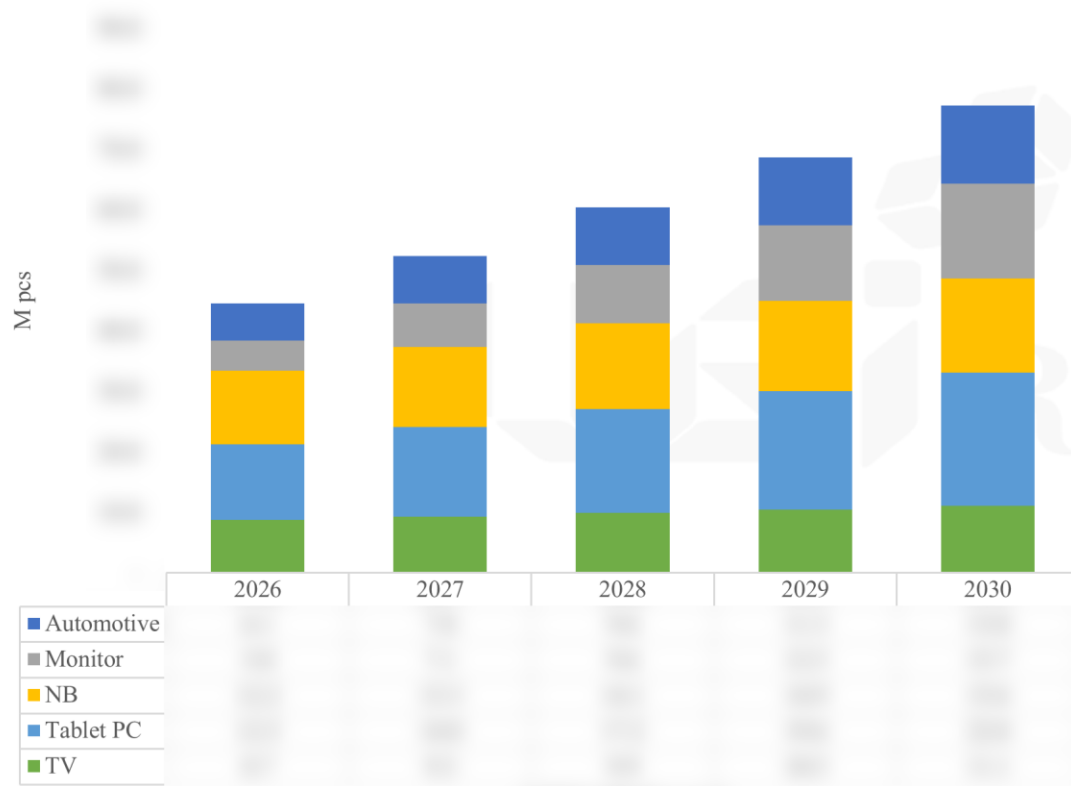
Company	Application	2026	2027	2028	2029	2030
BOE	Automotive					
	Tablet PC					
EverDisplay	Automotive					
	NB					
	Tablet PC					
LG Display	Automotive					
	Monitor					
	NB					
	Tablet PC					
Samsung Display	Automotive					
	Monitor					
	NB					
	Tablet PC					
Visionox	TV					
	Tablet PC					
Total						

10. OLED Market Outlook

10.3 Market Outlook by Application

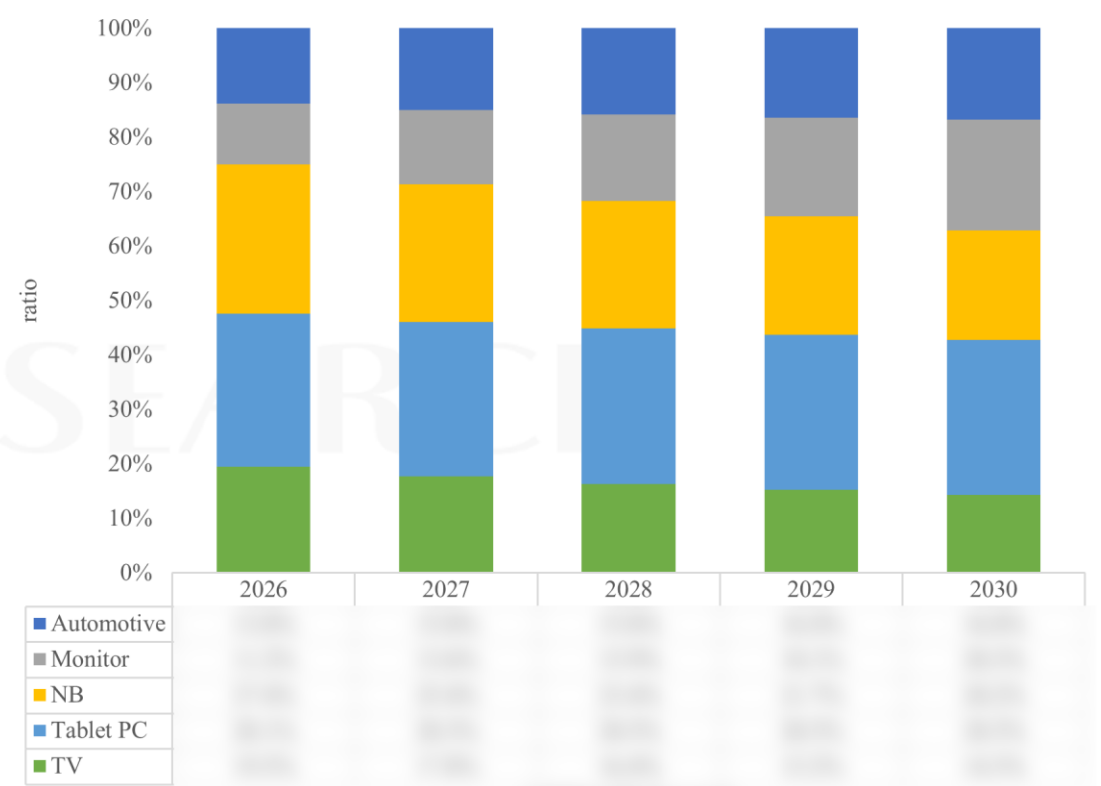
Shipment outlook

Shipment forecast by application



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Shipment ratio forecast by application



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