



2026 Analysis Report on China's OLED Supply Chain Management

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1. Equipment SCM Analysis

1.1 Current Line Status by Chinese OLED Panel Maker

Company	Line	Product	Evaporator				Status
			Gen	Phase	Capa. [/Month]	Vendor	
BOE	B7						
	B11						
	B12						
	B16						
	BMOT						
TCL CSOT	T4						
	T8						

Source: UBI Research DB

1. Equipment SCM Analysis

1.1 Current Line Status by Chinese OLED Panel Maker

Company	Line	Product	Evaporator				Status
			Gen	Phase	Capa. [/Month]	Vendor	
Tianma	Shanghai(TM16)						
	Wuhan(TM17)						
	Xiamen(TM18)						
Visionox	V1						
	V2						
	V3						
	V5						
Everdisplay	Shanghai						

Source: UBI Research DB

1. Equipment SCM Analysis

1.2 Current Status of OLED Module Lines in China

Company	Region	Application	Number of Line	Tact time	Yearly Capa/line	Yearly Total Capa
BOE	B7 Chengdu					
	B11 Mianyang					
	B12 Chongqing					
	B16 Chengdu					
TCL CSOT	M4 Wuhan					
	T8 Guangzhou					

Source: UBI Research DB

1. Equipment SCM Analysis

1.2 Current Status of OLED Module Lines in China

Company	Region	Application	Number of Line	Tact time	Yearly Capa/line	Yearly Total Capa
Tianma	TM8 Shanghai					
	TM17 Wuhan					
	TM18 Xiamen					
Visionox	Hefei M3					
	Guangzhou M4					
Everdisplay	Shanghai					

Source: UBI Research DB

1. Equipment SCM Analysis

1.4 Key Equipment SCM Status by Line – BOE

Process step		Equipment	B7	B11	B12	B16
LTPS	PI Coating					
	PI Curing					
	Crystallization					
	Deposition					
	Exposure					
	Developing					
OLED	Evaporation					
	Tension					
	TFE inorganic					
	TFE organic					
LLO	Lamination					
	LLO					
Cell	Cutting					
	Inspection					
Module	Bonding					

Source: UBI Research DB

1. Equipment SCM Analysis

1.6 Mass Production Capacity Forecast by OLED Line

Company	Fab. Location	Gen	Backplane	COE Capa	Application	Number of lines	Customer	2026	2027	2028	2029	2030
BOE	Chengdu B7	6	LTPS TFT									
BOE	Chengdu B7	6	LTPO TFT									
BOE	Mianyang B11	6	LTPS TFT									
BOE	Mianyang B11	6	LTPO TFT									
BOE	Chongqing B12	6	LTPS TFT									
BOE	Chongqing B12	6	LTPS TFT									
BOE	Chongqing B12	6	LTPO TFT									
BOE	Chongqing B12	6	LTPS TFT									
BOE	Chengdu B16	8.6	LTPO TFT									
BOE	Chengdu B16	8.6	LTPO TFT									

1. Equipment SCM Analysis

1.6 Mass Production Capacity Forecast by OLED Line

Company	Fab. Location	Gen	Backplane	COE Capa	Application	Number of lines	Customer	2026	2027	2028	2029	2030
TCL CSOT	Wuhan T4	6	LTPS TFT					*	*	*	*	*
TCL CSOT	Wuhan T4	6	LTPO TFT					*	*	*	*	*
TCL CSOT	Guangzhou T8	8.6	Oxide TFT					*	*	*	*	*
Tianma	Shanghai	5.5	LTPS TFT					*	*	*	*	*
Tianma	Wuhan	6	LTPS TFT					*	*	*	*	*
Tianma	Wuhan	6	LTPO TFT					*	*	*	*	*
Tianma	Xiamen	6	LTPS TFT					*	*	*	*	*
Tianma	Xiamen	6	LTPO TFT					*	*	*	*	*

1. Equipment SCM Analysis

1.6 Mass Production Capacity Forecast by OLED Line

Company	Fab. Location	Gen	Backplane	COE Capa	Application	Number of lines	Customer	2026	2027	2028	2029	2030
Visionox	Kunshan V1	5.5	LTPS TFT									
Visionox	Kunshan V1	5.5	LTPS TFT									
Visionox	Guan V2	6	LTPS TFT									
Visionox	Hefei V3	6	LTPS TFT									
Visionox	Hefei V3	6	LTPO TFT									
Visionox	Hefei V5	8.6	LTPO TFT									
HKC	Kunshan H6	5.5	LTPS TFT									
Everdisplay	Shanghai 1	4.5	LTPS TFT									
Everdisplay	Shanghai 2	6	LTPS TFT									
Everdisplay	Shanghai 2	6	LTPS TFT									

2. SCM Analysis by Component and Material

2.2 PI for Flexible OLED Backplanes

PI Suppliers to Chinese Panel Makers

- Chinese PI suppliers are expanding their supply volume based on domestic demand from BOE, Visionox, and TCL CSOT.
- BOE, CSOT, and Visionox still remain highly dependent on Japanese suppliers such as UBE and Kaneka. However, they are expanding cooperation with Chinese material suppliers including Taimide, TPI Tech, and Zhongxing Taiyi, while increasing the share of local procurement in China.
- BOE is particularly active in securing a local Chinese PI material supply chain and strengthening its internal sourcing strategy.

Company	Nation	Key development trends	Significant
SKC	South Korea	SKC is a leading global PI supplier, serving major OLED panel makers. It has expanded its production capacity and is actively developing new PI materials for flexible OLED applications.	SKC's PI products are widely used in flexible OLED backplanes, particularly for high-resolution displays.
Kolon Industry	South Korea	Kolon Industry is a major PI supplier in South Korea, with a strong focus on flexible OLED materials. It has been expanding its global presence and is investing in R&D for next-generation PI materials.	Kolon Industry's PI products are used in various flexible OLED displays, including foldable smartphones.
Kaneka	Japan	Kaneka is a leading Japanese PI supplier, known for its high-quality PI products. It has been expanding its production capacity and is actively developing new PI materials for flexible OLED applications.	Kaneka's PI products are widely used in flexible OLED backplanes, particularly for high-resolution displays.
UBE Industries	Japan	UBE Industries is a leading Japanese PI supplier, known for its high-quality PI products. It has been expanding its production capacity and is actively developing new PI materials for flexible OLED applications.	UBE Industries' PI products are widely used in flexible OLED backplanes, particularly for high-resolution displays.
Sumitomo Chem.	Japan	Sumitomo Chemical is a leading Japanese PI supplier, known for its high-quality PI products. It has been expanding its production capacity and is actively developing new PI materials for flexible OLED applications.	Sumitomo Chemical's PI products are widely used in flexible OLED backplanes, particularly for high-resolution displays.
Taimide Tech	China	Taimide Tech is a leading Chinese PI supplier, known for its high-quality PI products. It has been expanding its production capacity and is actively developing new PI materials for flexible OLED applications.	Taimide Tech's PI products are widely used in flexible OLED backplanes, particularly for high-resolution displays.
Zhongxing Taiyi (中兴泰宜)	China	Zhongxing Taiyi is a leading Chinese PI supplier, known for its high-quality PI products. It has been expanding its production capacity and is actively developing new PI materials for flexible OLED applications.	Zhongxing Taiyi's PI products are widely used in flexible OLED backplanes, particularly for high-resolution displays.
TPI Tech (江阴天江科技)	China	TPI Tech is a leading Chinese PI supplier, known for its high-quality PI products. It has been expanding its production capacity and is actively developing new PI materials for flexible OLED applications.	TPI Tech's PI products are widely used in flexible OLED backplanes, particularly for high-resolution displays.
Wuxi Xiduo (无锡希多)	China	Wuxi Xiduo is a leading Chinese PI supplier, known for its high-quality PI products. It has been expanding its production capacity and is actively developing new PI materials for flexible OLED applications.	Wuxi Xiduo's PI products are widely used in flexible OLED backplanes, particularly for high-resolution displays.

2. SCM Analysis by Component and Material

2.4 PDL / PSPI

Supply Status of Transparent PSPI

Company	Line	Supplier
BOE	B7	
	B11	
	B12	
Tianma	Wuhan	
	Xiamen	
Visionox	V1	
	V2	
	V3	
Everdisplay	Shanghai 4.5G	
	Shanghai 6G	

Supply Status of Black PDL

Company	Supplier
BOE	
TCL CSOT	
Tianma	
Visionox	

2. SCM Analysis by Component and Material

2.11 Total SCM

▀ By Company

Company	Country	Material/Product	Key Customers	Notes
Dongjin Semichem	Korea			
OMAT	China			
Greenda	China			
Sunheat	China			
Runjin	China			
Toray	Japan			
Mitsubishi Chemical	Japan			
Duksan Neolux	Korea			
Minseadvanced	China			
Jilin OLED	China			
Rouxian	China			

2. SCM Analysis by Component and Material

2.11 Total SCM

▀ By Product

Materials	Detail materials	Company
TFE Materials	TFE Ink	...
Deposition Masks	Open Mask	...
	CVD Mask	...
	FMM	...
Photo Mask	Photo Mask	...
Organic / Optical Materials	Low-temp OC	...
	Low-temp BM	...
	Low-temp RGB	...
	Color Filter PS	...
	PFA	...
	RGB Prime / G-R Dopant / HTL	...
PI-based Materials	Yellow PI	...
	PSPI	...
	CPI Film	...

2. SCM Analysis by Component and Material

2.11 Total SCM

By Product

Materials	Detail materials	Company
Process Materials	Wet Chemical	
	Target	
	High-refractive Monomer	
	Transparent PDL	
	Black PDL	
Adhesive Materials	OCA / OCR	
Polarizer Materials	Polarizer	
	PMMA for Polarizer	
	COP Film	
	Retardation Film	
	Polarizer Protective Film	
	Surface Treatment for Polarizer	
Cover Window Materials	Cover Window Glass	
	UTG	
	CPI Film (Cover Window / Hybrid)	
	Protective Film / Lamination	

3. SCM Analysis by Emitting Material

3.1 SCM by Material Set for Each Panel Maker

Supply Chain by Small-Size OLED Emitting Material Set for BOE

Material			L9(local)	L9(Apple)	Q9(local)	L10(Apple)	Q10(local)	L11(Apple)	Q11(local)
CPL									
EIL									
ETL									
aETL									
EML	Red	Host							
		Dopant							
	Green	Host							
		Dopant							
	Blue	Host							
		Dopant							
R prime									
G prime									
B prime									
P+									
HTL									

Source: UBI Research DB

3. SCM Analysis by Emitting Material

3.1 SCM by Material Set for Each Panel Maker

Supply Chain by Small-Size OLED Emitting Material Set for TCL CSOT

Material			C4	C5	C6	C7	C8	C9	C10
CPL									
EIL									
ETL									
aETL									
EML	Red	Host							
		Dopant							
	Green	Host							
		Dopant							
	Blue	Host							
		Dopant							
R prime									
G prime									
B prime									
P+									
HTL									

Source: UBI Research DB

3. SCM Analysis by Emitting Material

3.1 SCM by Material Set for Each Panel Maker

Supply Chain by Small-Size OLED Emitting Material Set for Tianma

Material			T5	T6	T7	T8	T9	T10
CPL								
EIL								
ETL								
aETL								
EML	Red	Host						
		Dopant						
	Green	Host						
		Dopant						
	Blue	Host						
		Dopant						
R prime								
G prime								
B prime								
P+								
HTL								

Source: UBI Research DB

3. SCM Analysis by Emitting Material

3.1 SCM by Material Set for Each Panel Maker








Supply Chain by Small-Size OLED Emitting Material Set for Visionox

Material			VM5	VM6(V2)	VM6(V3)	VM7	VM8	VM9
CPL								
EIL								
ETL								
aETL								
EML	Red	Host						
		Dopant						
	Green	Host						
		Dopant						
	Blue	Host						
		Dopant						
R prime								
G prime								
B prime								
P+								
HTL								

Source: UBI Research DB

4. OLED Smartphone and Foldable Phone SCM Analysis

4.2 Trends in Foldable Smartphone Models Launched in China in 2025

Company	Oppo	Huawei	Xiaomi	Vivo	Huawei	Honor	Honor
Model							
Size [inch]							
Cover Window							
Resolution							
Panel Supplier							
Feature							
Hinge							
Picture							

Source: GSMArena.com, UBI Research DB

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