



LASER IS A RESILIENT BUSINESS WITH EXPECTED MARKET GROWTH IN MANY SEGMENTS

While overall global production showed significant growth, the laser industry faced challenges in 2024, both due to lower demand but also due to the rapid drop of ASPs.

The major driver of the global lasers market is the semiconductors industry as lasers are used both for the processing of materials during the manufacturing steps of chips, as well as directly as key components for the operation of different devices such as optical modules. The global semiconductors market saw a spectacular growth of 19% during 2024, due to increased hardware demand from datacentres.

Despite global uncertainties, we are confident that the laser market will continue to grow with a 5.1% CAGR over 2024-2030 to reach near \$ 20 Bn in 2030.

The laser market showed diverse performance across segments:

- **kW materials processing** faced strong challenges due to industry slowdowns and decrease of ASPs.
- **sub-kW materials processing** remains robust, due to the high demand of lasers from the semiconductors industry
- **Marking and engraving** performed weakly due to lower demand and the drop of ASPs.
- **Photolithography** was sluggish in 2024, but is expected to recover from 2026 and on.
- **Communications** lasers are set to grow in 2024-2025, driven by AI, datacentre expansion, and M2M

applications.

- **Sensing and Instrumentation:** Growth in life sciences and industrial sensing is driven by challenges in healthcare, essential goods production, and energy transition requiring precise laser-based devices. In Automotive and Mobility, the laser market, including LiDAR for ADAS, will grow significantly as cost-effective solutions enable wider adoption in mass-market vehicles. For Mobile and Consume,: ToF sensors using lasers in smartphones, cameras, and AR/VR systems are expected to grow rapidly for consumer and professional applications.
- In **Medicine and Cosmetics**, affordable diode laser technologies expand accessibility to medical and cosmetic applications, including home-based cosmetic treatments.
- In **Aerospace and Defense**, the global tensions and the need for modernized arsenals will drive increased sales of lasers for defense, including military sensing and high-power laser weapons. Significant investments are being made worldwide in laser systems.
- For **R&D**, the push for greener energy, innovative medicines, and new technologies will boost global funding for R&D projects, benefiting the laser market. Lasers are vital tools in various research fields, including quantum technologies, physics, chemistry, materials science, and biology.

INFORMATION SOURCES

- In-house knowledge of laser technologies, their applications and their markets.
- Market data based on financial & business information on 400+ laser technologies' market players.
- Interviews with key companies that manufacture Laser sources and with laser integrators and suppliers.
- Literature research.
- Participation in international conferences and expositions in the universe of lasers.

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CONTACT

Susmita SRIDHAR, PhD
ssridhar@tematys.com
TEMATYS
7 Rue de la Croix Martre
91120 PALAISEAU
Tel: +33 6 16 17 12 91
Fax: +33 9 72 39 44 39
www.tematys.com

AUTHORS TEMATYS AND YOLE



Kimon MORATIS, PhD:
Photonics Markets' Analyst,
TEMATYS



Thierry ROBIN, PhD:
Partner, Product
Features Definition,
TEMATYS



Jacques COCHARD:
Partner, Technology
Transfer & Research
Valorization, TEMATYS



Eric MOUNIER, PhD:
Chief Analyst,
Photonics & Sensing,
YOLE

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CONTACT & ORDERS

Susmita SRIDHAR, PhD
ssridhar@tematys.com
TEMATYS
7 Rue de la Croix Martre
91120 PALAISEAU
Tel: +33 6 16 17 12 91
Fax: +33 9 72 39 44 39
www.tematys.com

1. INTRODUCTION

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- Overview of the Global Market of Laser Sources for 2024
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- The Global Market of Lasers by Applications for 2024
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Susmita SRIDHAR, PhD
ssridhar@tematys.com
TEMATYS
7 Rue de la Croix Martre
91120 PALAISEAU
Tel: +33 6 16 17 12 91
Fax: +33 9 72 39 44 39
www.tematys.com

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CONTACT

Susmita SRIDHAR, PhD

ssridhar@tematys.com

Tel: +33 6 16 17 12 91

NAF 7490B - Siret 528 943 616 00011

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