

Realfiction highlights market opportunities

Realfiction has conducted a comprehensive Market Opportunity Assessment to quantify the Total Addressable Market (TAM) for three application areas within the display industry where its Directional Pixel Technology™—among others—can be utilized: automotive center stack displays, gaming monitors, and large-format televisions (65" and above). This analysis is not a projection of future revenue but rather an illustration of the substantial market potential available to even emerging players in the industry.

Significant market scale identified

Based on 2022 and 2023 production volumes[1], the TAM for these three application areas remains substantial:

- **Center stack displays (>10"):** 47.5 million units (2022) # 53.8 million units (2023)
- **Gaming monitors:** 19.8 million units (2022) # 20.8 million units (2023)
- **65" and larger TVs:** 28.5 million units (2022) # 33.3 million units (2023)

Building on this strong market foundation, Realfiction has developed a range of potential per-unit licensing revenue scenarios based on industry trends and market penetration rates. These scenarios are based on 2023 production volumes without applying a growth rate. However, industry forecasts indicate that these application areas are expected to grow by more than 7% annually[2], further increasing the long-term market opportunity.

Potential revenue scenarios from specific application areas

Three scenarios—low, medium, and high—have been mapped out for potential per-unit licensing revenue across the automotive, gaming, and television display application areas. Under the medium-case scenario, market opportunities could lead to:

- US\$26 million annually in per-unit licensing revenue from automotive displays
- US\$20 million annually in per-unit licensing revenue from gaming monitors
- US\$58 million annually in per-unit licensing revenue from 65"+ TVs.

In a few years, per-unit market opportunities under this scenario could exceed US\$100 million annually, and the high-case scenario illustrates an even greater opportunity, exceeding US\$250 million annually. While the low-case scenario illustrates the most conservative opportunity, exceeding US\$14 million annually, it—like the other scenarios—does not account for additional revenue sources described in the following section.

The market opportunity calculations have been prepared by Realfiction based on publicly available industry data and internal analyses. The medium scenario is based on single-digit market shares and Realfiction's own estimates of future per-unit license fees for different types of displays.

Additional revenue opportunities

Beyond per-unit license fees, Realfiction anticipates other revenue streams, including:

- Upfront license fees for technology access
- Milestone-based payments tied to development and commercial deployment

- Sales of materials and displays (including proof-of-concept units) leveraging proprietary technology.

Furthermore, this analysis does not consider other high-potential markets where innovative display technologies are increasingly in demand, including medical imaging, engineering, architecture, industrial design, and digital signage. Moreover, further market opportunities are expected to emerge from Realfiction's proprietary technology for glasses-free 3D and multi-view displays beyond traditional flat-screen applications.

A growing opportunity for innovation

"Our analysis highlights the vast opportunities within the display industry," said Clas Dyrholm, CEO of Realfiction. "While these figures do not reflect our internal sales forecasts, they showcase the scale of potential for innovative technologies and business models to capture even a fraction of this market. As new use cases emerge, we expect further opportunities to arise from our unique approach to multi-view and glasses-free 3D displays."

This press release builds upon Realfiction's announcement from January 19, 2025, which stated: "A future announcement will address commercial prospects once customer expectations are aligned and product qualifications are finalized." While this update outlines the broader market opportunities related to our collaboration, it is not specific to the license and collaboration agreement referenced in the previous press release. Realfiction still plans to provide a further update on commercial prospects once the alignment and qualification processes are completed.

As Realfiction continues to refine its strategy, this market sizing serves as a foundation for discussions with industry stakeholders.

[1] Production volumes for 2022 and 2023 are derived from third-party sources, including www.kdia.org, www.statista.com, www.appliedmaterials.com and www.displaydaily.com.

[2] Market growth projections are derived from third-party sources, including www.verifiedmarketresearch.com and www.precedenceresearch.com.

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About Realfiction Holding AB

Founded in Denmark in 2008, Realfiction is a provider of cutting-edge 3D display technologies designed for tomorrow's needs, featuring technological breakthroughs with its Directional Pixel Technology for LCD, OLED and microLED. These technologies support a wide range of use cases, including enhancing driving safety, medical imaging, immersive gaming and entertainment, digital signage, as well as applications in architecture, engineering, and design. The Company offers a comprehensive intellectual property portfolio tailored for OEMs and Tier-1 partners involved in developing and marketing displays for markets and industries requiring high-resolution multistereoscopic displays. All technologies are ready for licensing, and Realfiction is actively pursuing commercial licensing agreements and partnerships to pave the way to mass production. Realfiction's patent portfolio comprises 15 patent families with applications filed in multiple countries. Realfiction Holding AB's shares are publicly traded on Nasdaq Stockholm First North under the symbol "REALFI", with the share's ISIN code being SE0009920994.

Attachments

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