

Global Indium Gallium Zinc Oxide (IGZO) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Indium Gallium Zinc Oxide (IGZO) market size is expected to reach \$ 437 million by 2032, rising at a market growth of 9.5% CAGR during the forecast period (2026-2032).

Indium Gallium Zinc Oxide (IGZO) is an amorphous metal oxide semiconductor material composed of the oxides of three metallic elements: indium (In), gallium (Ga), and zinc (Zn). Its chemical formula is typically represented as $\text{In}_x\text{Ga}_y\text{Zn}_{1-x-y}\text{O}$, and it exhibits high electron mobility (approximately 10–30 $\text{cm}^2/\text{V}\cdot\text{s}$, which is 20–30 times that of amorphous silicon), high transparency (visible light transmittance >85%), and low power consumption. IGZO is primarily used as the channel layer material in thin-film transistors (TFTs), particularly in the display panel sector, where it significantly enhances screen resolution, refresh rate, and energy efficiency while supporting flexible display technologies (such as rollable or foldable screens).

Global sales of indium gallium zinc oxide reached 185 tons in 2025, with an average price of USD 1,188 per Kg.

Driving factors

Display technology upgrades: The demand for high-resolution, low-power screens is surging in smartphones, in-vehicle displays, and AR/VR devices. For example, the Apple iPad Air and Apple Watch adopt IGZO technology, reducing power consumption by 57% compared to previous generations.

OLED and Micro LED Synergy: IGZO serves as the drive circuit material for OLED panels, improving light emission uniformity and reducing costs; simultaneously, IGZO-

based mass transfer technology for Micro LED drives its adoption in high-end displays.

Policy Support: China has included indium in the “Strategic Minerals Directory,” promoting the domestic production of IGZO target materials (e.g., Longhua Technology has become the sole domestic supplier).

Challenges

Indium resource scarcity: 90% of global indium relies on zinc ore by-products, and China's export quotas are being reduced (limited to 30% of annual production starting in 2024), which may increase raw material costs.

Technological competition: Low-temperature polysilicon (LTPS) and two-dimensional semiconductors (such as molybdenum disulfide) pose a substitution threat to IGZO in certain applications.

As a core material for display technology, IGZO will benefit significantly from the growing demand for high resolution, flexibility, and low power consumption. Despite challenges such as indium resource constraints and technological competition, its expanding applications in emerging fields like AR/VR, automotive displays, and Micro LED, coupled with the rise of China's supply chain, will drive continued market expansion.

This report studies the global Indium Gallium Zinc Oxide (IGZO) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Indium Gallium Zinc Oxide (IGZO) and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Indium Gallium Zinc Oxide (IGZO) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Indium Gallium Zinc Oxide (IGZO) total production and demand, 2021-2032, (K MT)

Global Indium Gallium Zinc Oxide (IGZO) total production value, 2021-2032, (USD

Million)

Global Indium Gallium Zinc Oxide (IGZO) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K MT), (based on production site)

Global Indium Gallium Zinc Oxide (IGZO) consumption by region & country, CAGR, 2021-2032 & (K MT)

U.S. VS China: Indium Gallium Zinc Oxide (IGZO) domestic production, consumption, key domestic manufacturers and share

Global Indium Gallium Zinc Oxide (IGZO) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K MT)

Global Indium Gallium Zinc Oxide (IGZO) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

Global Indium Gallium Zinc Oxide (IGZO) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

This report profiles key players in the global Indium Gallium Zinc Oxide (IGZO) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Mitsui Metals, ULVAC, JX Advanced Metals, ZL Advanced Materials, Wuhu Yingri Technology, Vital Thin Film Materials, Enam Optoelectronic Material, APG Material Technology, American Elements, ANP Materials, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Indium Gallium Zinc Oxide (IGZO) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K MT) and average price (USD/MT) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by

year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Indium Gallium Zinc Oxide (IGZO) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Indium Gallium Zinc Oxide (IGZO) Market, Segmentation by Type:

Planar IGZO

Rotating IGZO

Global Indium Gallium Zinc Oxide (IGZO) Market, Segmentation by Crystal structure:

Amorphous IGZO (a-IGZO)

Polycrystalline IGZO (poly-IGZO)

Single-crystal IGZO (single-crystal IGZO)

Global Indium Gallium Zinc Oxide (IGZO) Market, Segmentation by Sales Channels:

Direct Sales

Distribution

Global Indium Gallium Zinc Oxide (IGZO) Market, Segmentation by Application:

Display Panel Field

Flexible Electronic Devices

Power Semiconductors and Sensors

Other

Companies Profiled:

Mitsui Metals

ULVAC

JX Advanced Metals

ZL Advanced Materials

Wuhu Yingri Technology

Vital Thin Film Materials

Enam Optoelectronic Material

APG Material Technology

American Elements

ANP Materials

KV Materials

Key Questions Answered:

1. How big is the global Indium Gallium Zinc Oxide (IGZO) market?
2. What is the demand of the global Indium Gallium Zinc Oxide (IGZO) market?
3. What is the year over year growth of the global Indium Gallium Zinc Oxide (IGZO) market?
4. What is the production and production value of the global Indium Gallium Zinc Oxide (IGZO) market?
5. Who are the key producers in the global Indium Gallium Zinc Oxide (IGZO) market?
6. What are the growth factors driving the market demand?

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