

# Global Indium Gallium Zinc Oxide (IGZO) Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Indium Gallium Zinc Oxide (IGZO) market size was valued at US\$ 227 million in 2025 and is forecast to a readjusted size of US\$ 437 million by 2032 with a CAGR of 9.5% during review period.

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 is a detailed and comprehensive analysis for global Indium Gallium Zinc Oxide (IGZO) market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

## Key Features:

Global Indium Gallium Zinc Oxide (IGZO) market size and forecasts, in consumption value (\$ Million), sales quantity (K MT), and average selling prices (USD/MT), 2021-2032

Global Indium Gallium Zinc Oxide (IGZO) market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K MT), and average selling prices (USD/MT), 2021-2032

Global Indium Gallium Zinc Oxide (IGZO) market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K MT), and average selling prices (USD/MT), 2021-2032

Global Indium Gallium Zinc Oxide (IGZO) market shares of main players, shipments in revenue (\$ Million), sales quantity (K MT), and ASP (USD/MT), 2021-2026

### **The Primary Objectives in This Report Are:**

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Indium Gallium Zinc Oxide (IGZO)

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Indium Gallium Zinc Oxide (IGZO) market based on the following parameters - company overview, sales quantity, revenue, 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.

### **Market Segmentation**

Indium Gallium Zinc Oxide (IGZO) market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Planar IGZO

Rotating IGZO

Market segment by Crystal structure

Amorphous IGZO (a-IGZO)

Polycrystalline IGZO (poly-IGZO)

Single-crystal IGZO (single-crystal IGZO)

Market segment by Sales Channels

Direct Sales

Distribution

Market segment by Application

Display Panel Field

Flexible Electronic Devices

Power Semiconductors and Sensors

Other

Major players covered

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

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

**The content of the study subjects, includes a total of 15 chapters:**

Chapter 1, to describe Indium Gallium Zinc Oxide (IGZO) product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Indium Gallium Zinc Oxide (IGZO), with price, sales quantity, revenue, and global market share of Indium Gallium Zinc Oxide (IGZO) from 2021 to 2026.

Chapter 3, the Indium Gallium Zinc Oxide (IGZO) competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Indium Gallium Zinc Oxide (IGZO) breakdown data are shown at the

regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Indium Gallium Zinc Oxide (IGZO) market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Indium Gallium Zinc Oxide (IGZO).

Chapter 14 and 15, to describe Indium Gallium Zinc Oxide (IGZO) sales channel, distributors, customers, research findings and conclusion.

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