

Global Indium Phosphide Substrate for Data Centers Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Indium Phosphide Substrate for Data Centers market size is expected to reach \$ 1811 million by 2032, rising at a market growth of 11.2% CAGR during the forecast period (2026-2032).

Indium phosphide substrates for data centers refer to semiconductor substrate wafers made from single-crystal indium phosphide (InP). They are specifically designed for manufacturing high-speed optoelectronic and high-frequency radio frequency devices, serving as a core material in high-speed optical communication and high-speed interconnect systems within data centers.

The upstream of the industry chain mainly includes suppliers of high-purity phosphorus and indium raw materials, as well as key equipment and material suppliers such as single crystal growth equipment (e.g., VGF, LEC crystal growth furnaces), high-purity quartz crucibles, and precision temperature control systems. These links determine the crystal defect density, uniformity, and yield. The midstream is the indium phosphide substrate manufacturing process, encompassing crystal growth, slicing, polishing, pre-epitaxy processing, and sorting. The core is the preparation of high-purity, low-defect InP single crystal substrates and epitaxial wafers that meet the requirements of optical communication devices, used in subsequent laser and high-speed optoelectronic device manufacturing. The downstream is mainly used in high-speed optical communication in data centers, including 400G/800G/1.6T optical modules, coherent optical communication systems, silicon photonics hybrid integrated devices, and high-speed optoelectronic integrated circuits (PICs), ultimately serving AI computing centers, hyperscale data centers, and high-speed network interconnection scenarios. It is one of the key basic materials supporting next-generation high-speed optical interconnects.

In 2025, the global sales volume of indium phosphide substrates for data centers will reach 364,000 pieces, with a production capacity of approximately 520,000 pieces. The average selling price is US\$2,300 per piece, and the average gross profit margin is 30%-40%.

Global investment in AI infrastructure and high-speed communication networks continues to increase, driving rapid upgrades to data center optical interconnects. Meanwhile, countries are placing greater emphasis on the security of the semiconductor key materials supply chain, with III-V compound semiconductors such as InP being included in their high-end materials strategic plans. Companies in Europe, the US, and Japan are continuously increasing capital expenditures to expand their optical communication materials production capacity; however, due to high technological barriers, supply elasticity remains limited in the short term, resulting in an industry characterized by 'rapid demand growth + rigid supply constraints.'

This report studies the global Indium Phosphide Substrate for Data Centers production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Indium Phosphide Substrate for Data Centers 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 Phosphide Substrate for Data Centers that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Indium Phosphide Substrate for Data Centers total production and demand, 2021-2032, (K Pcs)

Global Indium Phosphide Substrate for Data Centers total production value, 2021-2032, (USD Million)

Global Indium Phosphide Substrate for Data Centers production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs), (based on production site)

Global Indium Phosphide Substrate for Data Centers consumption by region & country, CAGR, 2021-2032 & (K Pcs)

U.S. VS China: Indium Phosphide Substrate for Data Centers domestic production, consumption, key domestic manufacturers and share

Global Indium Phosphide Substrate for Data Centers production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Pcs)

Global Indium Phosphide Substrate for Data Centers production by Type, production,

value, CAGR, 2021-2032, (USD Million) & (K Pcs)

Global Indium Phosphide Substrate for Data Centers production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

This report profiles key players in the global Indium Phosphide Substrate for Data Centers 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 Sumitomo, AXT, JX Advanced Metals, InPACT, Wafer Tech, Yunnan Germanium Industry, Lead Technology, Zhuhai Dingtai Chip Source, GRINM Advanced 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 Phosphide Substrate for Data Centers market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Pcs) and average price (US\$/Pc) 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 Phosphide Substrate for Data Centers Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Indium Phosphide Substrate for Data Centers Market, Segmentation by Type:

N-Type InP

P-Type InP

Global Indium Phosphide Substrate for Data Centers Market, Segmentation by Wafer Size:

2 Inches

3 Inches

4 Inches

6 Inches

Global Indium Phosphide Substrate for Data Centers Market, Segmentation by Subsequent Process Forms:

Polished Wafer

Epiaxial Wafer

Global Indium Phosphide Substrate for Data Centers Market, Segmentation by Application:

High-Speed Optical Modules

Coherent Optical Communication Systems

Silicon Photonic Hybrid Integrated Devices

Photonic Integrated Circuits

Others

Companies Profiled:

Sumitomo

AXT

JX Advanced Metals

InPACT

Wafer Tech

Yunnan Germanium Industry

Lead Technology

Zhuhai Dingtai Chip Source

GRINM Advanced Materials

Key Questions Answered:

1. How big is the global Indium Phosphide Substrate for Data Centers market?
2. What is the demand of the global Indium Phosphide Substrate for Data Centers market?
3. What is the year over year growth of the global Indium Phosphide Substrate for Data Centers market?
4. What is the production and production value of the global Indium Phosphide Substrate for Data Centers market?
5. Who are the key producers in the global Indium Phosphide Substrate for Data Centers market?
6. What are the growth factors driving the market demand?

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