

Global LED Chips Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global LED Chips market size is expected to reach \$ 5707 million by 2032, rising at a market growth of 6.3% CAGR during the forecast period (2026-2032).

In 2024, global LED Chips production reached approximately 8,510 billion units, with an average global market price of around 0.40 US\$/k units. An LED chip is a solid-state semiconductor lighting device that directly converts electrical energy into light energy. Its core structure consists of a PN junction formed by combining P-type and N-type semiconductors. When a forward voltage is applied, carrier recombination occurs, leading to energy level transitions and the release of energy in the form of photons. This chip features high luminous efficiency, compact size, long lifespan, fast response, low driving voltage, and high color purity, making it a core component in semiconductor lighting and display technologies. The domestic LED chip market is dominated by leading enterprises such as Sanan Optoelectronics. Leveraging advantages in large-scale production, technological accumulation, and cost efficiency, these companies undertake mid-to-high-end chip foundry orders from international manufacturers, positioning China as a global core base for LED chip manufacturing.

LED chips are the core light-emitting components of light-emitting diode (LED) devices, composed of three major manufacturing stages: epitaxial growth, chip fabrication, and packaging. Their primary function is to efficiently convert electrical energy into visible light, and they are widely used in lighting, display, backlight, automotive, landscape, ultraviolet (UV), and infrared (IR) sensing applications. The LED chip industry combines the high technological barriers of semiconductor manufacturing with the vast demand of optoelectronic applications, making it one of the most technology- and capital-intensive sectors in the optoelectronics value chain. With the rise of Mini/Micro LED, automotive displays, and high color rendering lighting, the industry is transitioning from traditional

general lighting toward high-performance, high-value-added segments.

The upstream supply chain includes sapphire substrates, silicon carbide substrates, gallium nitride (GaN) epitaxial wafers, metal-organic sources (TMGa, TMIIn, etc.), photoresists, sputtering targets, and MOCVD equipment. Among these, the substrate and epitaxy processes have the highest technological barriers, with Japanese, U.S., and Taiwanese firms holding long-term dominance. Mainland Chinese companies have achieved breakthroughs in GaN-on-Si and Mini LED epitaxy. Equipment manufacturing remains concentrated, with Aixtron and Veeco controlling the high-end MOCVD market. Raw material costs are highly correlated with chemical precursor and wafer price fluctuations, creating upstream cost sensitivity.

The midstream manufacturing stage covers chip design, photolithography, etching, electrode formation, optical extraction optimization, and sorting/testing. Main product types include blue, red, and multi-wavelength chips, based on GaN and AlGaInP material systems. Mainland China is the world's largest LED chip production base, accounting for about 80% of global output, with major production hubs in Fujian, Jiangxi, and Guangdong. High-end products such as Mini/Micro LED chips require extremely tight control of epitaxial uniformity, defect density, and luminous efficiency, driving the industry's transition toward 8-inch silicon-based and large sapphire substrates.

Downstream applications are concentrated in three major sectors: lighting, display, and automotive. Lighting accounts for roughly 47% of demand, including indoor, commercial, and industrial illumination; display applications represent about 22%, spanning TVs, commercial signage, notebook backlighting, and direct-view screens; and automotive lighting accounts for around 2%, with rapid growth driven by intelligent vehicle penetration and ambient lighting adoption. The use of Mini/Micro LEDs in high-end displays and automotive HUDs has become a key source of incremental growth.

The cost structure of LED chips consists of about 50% for epitaxial wafers and substrates, 25% for chip processing and testing, 15% for equipment depreciation and labor, and the remainder for consumables and packaging-related costs. Variations in epitaxial material prices and depreciation rates are the main factors influencing profitability. As domestic MOCVD systems mature and epitaxial yields improve, overall production costs continue to decline.

The industry landscape is showing clear stratification. The global LED chip market is dominated by Chinese firms represented by San'an Optoelectronics, which leverage large-scale manufacturing, process expertise, and cost advantages to secure high- and

mid-end contract production orders from international brands—cementing China’s position as the world’s core manufacturing hub for LED chips. Key mainland players include San’an Optoelectronics, Epistar, Zhaochi Co., Ltd., and HC SemiTek, all of which maintain strong economies of scale. As display and automotive applications rise, domestic companies are rapidly shifting from cost-driven to performance-driven competition.

Technological trends indicate a shift from the “high-efficiency era” to an era of “high precision and high integration.” Mini LED and Micro LED technologies are emerging as the central directions—the former used in backlighting and direct displays, the latter in ultra-high-resolution displays. Meanwhile, UV-LEDs, IR-LEDs, and deep-UV chips are expanding rapidly in sterilization, inspection, and sensing markets. The industry is advancing toward larger wafer sizes (4-inch ? 6-inch ? 8-inch), enhanced epitaxial uniformity, and mass transfer technology as future competitive focal points.

Pricing varies significantly by application. Micro LED chips command the highest unit price, while conventional lighting-grade blue chips are declining annually due to efficiency gains and yield improvements. In contrast, high-end display chips remain stable or have slightly increased in price, reflecting limited supply and high technical requirements.

Profit margins generally range from 25–45%. High-end chips (Mini/Micro LED and automotive-grade) can exceed 40%, while general lighting chips remain around 25–30%. International firms maintain higher profitability through patent protection and superior yields, whereas Chinese manufacturers are improving profitability through localization of MOCVD systems, automation, and internal sourcing of materials. Global production capacity is concentrated in Mainland China, Taiwan, Japan, and South Korea. Mainland China holds the largest share, with individual production lines capable of processing 3–6 million epitaxial wafers per year. High-end chip production remains focused in Japan, Korea, and Taiwan. Standard lead times are 4–8 weeks, extending to 10–12 weeks for high-end display-grade products due to complex testing processes.

Payment terms generally involve 30% advance payment + 70% final payment or quarterly settlements, with a standard 12-month warranty. Major customers include packaging and module companies such as Nationstar Optoelectronics, Hongli Zhihui, and Refond, as well as end brands including Samsung, Apple, Huawei, and NVC Lighting. Some suppliers offer customized wavelength tuning and optical matching design to increase value-added content.

Future trends will focus on three key directions: (1) The LED chip industry will transition from “efficacy competition” to “application performance competition,” with Mini/Micro LED, automotive, and IR/UV segments providing structural growth; (2) China’s supply chain will further mature, achieving domestic independence in epitaxial equipment and high-end substrate production; (3) Manufacturing will evolve toward intelligent, low-defect, high-yield operations.

As a foundational pillar of the optoelectronics industry, LED chips will continue driving the convergence of lighting, display, and sensing technologies, advancing innovation across the global photonics landscape.

This report studies the global LED Chips production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for LED Chips 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 LED Chips that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global LED Chips total production and demand, 2021-2032, (Billion Units)

Global LED Chips total production value, 2021-2032, (USD Million)

Global LED Chips production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Billion Units), (based on production site)

Global LED Chips consumption by region & country, CAGR, 2021-2032 & (Billion Units)

U.S. VS China: LED Chips domestic production, consumption, key domestic manufacturers and share

Global LED Chips production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Billion Units)

Global LED Chips production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Billion Units)

Global LED Chips production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Billion Units)

This report profiles key players in the global LED Chips 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 Sanan Optoelectronics, Shenzhen Mtc, BOE HC SemiTek, Epistar, Jiangsu Azure, Kfeslightingco., Ltd, Focus Lightings Tech, Hangzhou Silan Microelectronics, Fujian Zhaoyuan Photoelectric, ELEMEDIA TECHNOLOGY, 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 LED Chips market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Billion Units) and average price (US\$/k units) 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 LED Chips Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global LED Chips Market, Segmentation by Type:

Lateral Chip LED

Vertical Chip LED

Flip Chip LED

Global LED Chips Market, Segmentation by Power:

Low Power (<math><0.5\text{W}</math>)

Medium Power (0.5-1W)

High Power (>1W)

Global LED Chips Market, Segmentation by Materials:

GaN

GaAs

Others

Global LED Chips Market, Segmentation by Application:

General Lighting

Backlighting

Direct Display & Screens

Automotive Lighting

Consumer Electronics & IoT

Others

Companies Profiled:

Sanan Optoelectronics

Shenzhen Mtc

BOE HC SemiTek

Epistar

Jiangsu Azure

Kfeslightingco., Ltd

Focus Lightings Tech

Hangzhou Silan Microelectronics

Fujian Zhaoyuan Photoelectric

ELEMEDIA TECHNOLOGY

Xiamen Changelight

Hua Lei photoelectric

Foshan Nationstar Optoelectronics

Nichia

Samsung

Seoul Semiconductor

AMS Osram

Lumileds

Cree LED

Key Questions Answered:

1. How big is the global LED Chips market?
2. What is the demand of the global LED Chips market?
3. What is the year over year growth of the global LED Chips market?
4. What is the production and production value of the global LED Chips market?
5. Who are the key producers in the global LED Chips market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 LED Chips Introduction
- 1.2 World LED Chips Supply & Forecast
 - 1.2.1 World LED Chips Production Value (2021 & 2025 & 2032)
 - 1.2.2 World LED Chips Production (2021-2032)
 - 1.2.3 World LED Chips Pricing Trends (2021-2032)
- 1.3 World LED Chips Production by Region (Based on Production Site)
 - 1.3.1 World LED Chips Production Value by Region (2021-2032)
 - 1.3.2 World LED Chips Production by Region (2021-2032)
 - 1.3.3 World LED Chips Average Price by Region (2021-2032)
 - 1.3.4 North America LED Chips Production (2021-2032)
 - 1.3.5 Europe LED Chips Production (2021-2032)
 - 1.3.6 China LED Chips Production (2021-2032)
 - 1.3.7 Japan LED Chips Production (2021-2032)
 - 1.3.8 South Korea LED Chips Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 LED Chips Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 LED Chips Major Market Trends

2 DEMAND SUMMARY

- 2.1 World LED Chips Demand (2021-2032)
- 2.2 World LED Chips Consumption by Region
 - 2.2.1 World LED Chips Consumption by Region (2021-2026)
 - 2.2.2 World LED Chips Consumption Forecast by Region (2027-2032)
- 2.3 United States LED Chips Consumption (2021-2032)
- 2.4 China LED Chips Consumption (2021-2032)
- 2.5 Europe LED Chips Consumption (2021-2032)
- 2.6 Japan LED Chips Consumption (2021-2032)
- 2.7 South Korea LED Chips Consumption (2021-2032)
- 2.8 ASEAN LED Chips Consumption (2021-2032)
- 2.9 India LED Chips Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World LED Chips Production Value by Manufacturer (2021-2026)
- 3.2 World LED Chips Production by Manufacturer (2021-2026)
- 3.3 World LED Chips Average Price by Manufacturer (2021-2026)
- 3.4 LED Chips Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global LED Chips Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for LED Chips in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for LED Chips in 2025
- 3.6 LED Chips Market: Overall Company Footprint Analysis
 - 3.6.1 LED Chips Market: Region Footprint
 - 3.6.2 LED Chips Market: Company Product Type Footprint
 - 3.6.3 LED Chips Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: LED Chips Production Value Comparison
 - 4.1.1 United States VS China: LED Chips Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: LED Chips Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: LED Chips Production Comparison
 - 4.2.1 United States VS China: LED Chips Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: LED Chips Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: LED Chips Consumption Comparison
 - 4.3.1 United States VS China: LED Chips Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: LED Chips Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based LED Chips Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based LED Chips Manufacturers, Headquarters and Production Site (States, Country)

- 4.4.2 United States Based Manufacturers LED Chips Production Value (2021-2026)
- 4.4.3 United States Based Manufacturers LED Chips Production (2021-2026)
- 4.5 China Based LED Chips Manufacturers and Market Share
 - 4.5.1 China Based LED Chips Manufacturers, Headquarters and Production Site (Province, Country)
 - 4.5.2 China Based Manufacturers LED Chips Production Value (2021-2026)
 - 4.5.3 China Based Manufacturers LED Chips Production (2021-2026)
- 4.6 Rest of World Based LED Chips Manufacturers and Market Share, 2021-2026
 - 4.6.1 Rest of World Based LED Chips Manufacturers, Headquarters and Production Site (State, Country)
 - 4.6.2 Rest of World Based Manufacturers LED Chips Production Value (2021-2026)
 - 4.6.3 Rest of World Based Manufacturers LED Chips Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

- 5.1 World LED Chips Market Size Overview by Type: 2021 VS 2025 VS 2032
- 5.2 Segment Introduction by Type
 - 5.2.1 Lateral Chip LED
 - 5.2.2 Vertical Chip LED
 - 5.2.3 Flip Chip LED
- 5.3 Market Segment by Type
 - 5.3.1 World LED Chips Production by Type (2021-2032)
 - 5.3.2 World LED Chips Production Value by Type (2021-2032)
 - 5.3.3 World LED Chips Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY POWER

- 6.1 World LED Chips Market Size Overview by Power: 2021 VS 2025 VS 2032
- 6.2 Segment Introduction by Power
 - 6.2.1 Low Power ($0.5W$)
 - 6.2.2 Medium Power (0.5-1W)
 - 6.2.3 High Power (>1W)
- 6.3 Market Segment by Power
 - 6.3.1 World LED Chips Production by Power (2021-2032)
 - 6.3.2 World LED Chips Production Value by Power (2021-2032)
 - 6.3.3 World LED Chips Average Price by Power (2021-2032)

7 MARKET ANALYSIS BY MATERIALS

7.1 World LED Chips Market Size Overview by Materials: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Materials

7.2.1 GaN

7.2.2 GaAs

7.2.3 Others

7.3 Market Segment by Materials

7.3.1 World LED Chips Production by Materials (2021-2032)

7.3.2 World LED Chips Production Value by Materials (2021-2032)

7.3.3 World LED Chips Average Price by Materials (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World LED Chips Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 General Lighting

8.2.2 Backlighting

8.2.3 Direct Display & Screens

8.2.4 Automotive Lighting

8.2.5 Consumer Electronics & IoT

8.2.6 Others

8.3 Market Segment by Application

8.3.1 World LED Chips Production by Application (2021-2032)

8.3.2 World LED Chips Production Value by Application (2021-2032)

8.3.3 World LED Chips Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Sanan Optoelectronics

9.1.1 Sanan Optoelectronics Details

9.1.2 Sanan Optoelectronics Major Business

9.1.3 Sanan Optoelectronics LED Chips Product and Services

9.1.4 Sanan Optoelectronics LED Chips Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Sanan Optoelectronics Recent Developments/Updates

9.1.6 Sanan Optoelectronics Competitive Strengths & Weaknesses

9.2 Shenzhen Mtc

9.2.1 Shenzhen Mtc Details

9.2.2 Shenzhen Mtc Major Business

9.2.3 Shenzhen Mtc LED Chips Product and Services

9.2.4 Shenzhen Mtc LED Chips Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Shenzhen Mtc Recent Developments/Updates

9.2.6 Shenzhen Mtc Competitive Strengths & Weaknesses

9.3 BOE HC SemiTek

9.3.1 BOE HC SemiTek Details

9.3.2 BOE HC SemiTek Major Business

9.3.3 BOE HC SemiTek LED Chips Product and Services

9.3.4 BOE HC SemiTek LED Chips Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 BOE HC SemiTek Recent Developments/Updates

9.3.6 BOE HC SemiTek Competitive Strengths & Weaknesses

9.4 Epistar

9.4.1 Epistar Details

9.4.2 Epistar Major Business

9.4.3 Epistar LED Chips Product and Services

9.4.4 Epistar LED Chips Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Epistar Recent Developments/Updates

9.4.6 Epistar Competitive Strengths & Weaknesses

9.5 Jiangsu Azure

9.5.1 Jiangsu Azure Details

9.5.2 Jiangsu Azure Major Business

9.5.3 Jiangsu Azure LED Chips Product and Services

9.5.4 Jiangsu Azure LED Chips Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Jiangsu Azure Recent Developments/Updates

9.5.6 Jiangsu Azure Competitive Strengths & Weaknesses

9.6 Kfeslightingco., Ltd

9.6.1 Kfeslightingco., Ltd Details

9.6.2 Kfeslightingco., Ltd Major Business

9.6.3 Kfeslightingco., Ltd LED Chips Product and Services

9.6.4 Kfeslightingco., Ltd LED Chips Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Kfeslightingco., Ltd Recent Developments/Updates

9.6.6 Kfeslightingco., Ltd Competitive Strengths & Weaknesses

9.7 Focus Lightings Tech

9.7.1 Focus Lightings Tech Details

9.7.2 Focus Lightings Tech Major Business

- 9.7.3 Focus Lightings Tech LED Chips Product and Services
- 9.7.4 Focus Lightings Tech LED Chips Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.7.5 Focus Lightings Tech Recent Developments/Updates
- 9.7.6 Focus Lightings Tech Competitive Strengths & Weaknesses
- 9.8 Hangzhou Silan Microelectronics
 - 9.8.1 Hangzhou Silan Microelectronics Details
 - 9.8.2 Hangzhou Silan Microelectronics Major Business
 - 9.8.3 Hangzhou Silan Microelectronics LED Chips Product and Services
 - 9.8.4 Hangzhou Silan Microelectronics LED Chips Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 Hangzhou Silan Microelectronics Recent Developments/Updates
 - 9.8.6 Hangzhou Silan Microelectronics Competitive Strengths & Weaknesses
- 9.9 Fujian Zhaoyuan Photoelectric
 - 9.9.1 Fujian Zhaoyuan Photoelectric Details
 - 9.9.2 Fujian Zhaoyuan Photoelectric Major Business
 - 9.9.3 Fujian Zhaoyuan Photoelectric LED Chips Product and Services
 - 9.9.4 Fujian Zhaoyuan Photoelectric LED Chips Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 Fujian Zhaoyuan Photoelectric Recent Developments/Updates
 - 9.9.6 Fujian Zhaoyuan Photoelectric Competitive Strengths & Weaknesses
- 9.10 ELEMEDIA TECHNOLOGY
 - 9.10.1 ELEMEDIA TECHNOLOGY Details
 - 9.10.2 ELEMEDIA TECHNOLOGY Major Business
 - 9.10.3 ELEMEDIA TECHNOLOGY LED Chips Product and Services
 - 9.10.4 ELEMEDIA TECHNOLOGY LED Chips Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 ELEMEDIA TECHNOLOGY Recent Developments/Updates
 - 9.10.6 ELEMEDIA TECHNOLOGY Competitive Strengths & Weaknesses
- 9.11 Xiamen Changelight
 - 9.11.1 Xiamen Changelight Details
 - 9.11.2 Xiamen Changelight Major Business
 - 9.11.3 Xiamen Changelight LED Chips Product and Services
 - 9.11.4 Xiamen Changelight LED Chips Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Xiamen Changelight Recent Developments/Updates
 - 9.11.6 Xiamen Changelight Competitive Strengths & Weaknesses
- 9.12 Hua Lei photoelectric
 - 9.12.1 Hua Lei photoelectric Details

- 9.12.2 Hua Lei photoelectric Major Business
- 9.12.3 Hua Lei photoelectric LED Chips Product and Services
- 9.12.4 Hua Lei photoelectric LED Chips Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.12.5 Hua Lei photoelectric Recent Developments/Updates
- 9.12.6 Hua Lei photoelectric Competitive Strengths & Weaknesses
- 9.13 Foshan Nationstar Optoelectronics
 - 9.13.1 Foshan Nationstar Optoelectronics Details
 - 9.13.2 Foshan Nationstar Optoelectronics Major Business
 - 9.13.3 Foshan Nationstar Optoelectronics LED Chips Product and Services
 - 9.13.4 Foshan Nationstar Optoelectronics LED Chips Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Foshan Nationstar Optoelectronics Recent Developments/Updates
 - 9.13.6 Foshan Nationstar Optoelectronics Competitive Strengths & Weaknesses
- 9.14 Nichia
 - 9.14.1 Nichia Details
 - 9.14.2 Nichia Major Business
 - 9.14.3 Nichia LED Chips Product and Services
 - 9.14.4 Nichia LED Chips Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Nichia Recent Developments/Updates
 - 9.14.6 Nichia Competitive Strengths & Weaknesses
- 9.15 Samsung
 - 9.15.1 Samsung Details
 - 9.15.2 Samsung Major Business
 - 9.15.3 Samsung LED Chips Product and Services
 - 9.15.4 Samsung LED Chips Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 Samsung Recent Developments/Updates
 - 9.15.6 Samsung Competitive Strengths & Weaknesses
- 9.16 Seoul Semiconductor
 - 9.16.1 Seoul Semiconductor Details
 - 9.16.2 Seoul Semiconductor Major Business
 - 9.16.3 Seoul Semiconductor LED Chips Product and Services
 - 9.16.4 Seoul Semiconductor LED Chips Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.16.5 Seoul Semiconductor Recent Developments/Updates
 - 9.16.6 Seoul Semiconductor Competitive Strengths & Weaknesses
- 9.17 AMS Osram

- 9.17.1 AMS Osram Details
- 9.17.2 AMS Osram Major Business
- 9.17.3 AMS Osram LED Chips Product and Services
- 9.17.4 AMS Osram LED Chips Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.17.5 AMS Osram Recent Developments/Updates
- 9.17.6 AMS Osram Competitive Strengths & Weaknesses
- 9.18 Lumileds
 - 9.18.1 Lumileds Details
 - 9.18.2 Lumileds Major Business
 - 9.18.3 Lumileds LED Chips Product and Services
 - 9.18.4 Lumileds LED Chips Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.18.5 Lumileds Recent Developments/Updates
 - 9.18.6 Lumileds Competitive Strengths & Weaknesses
- 9.19 Cree LED
 - 9.19.1 Cree LED Details
 - 9.19.2 Cree LED Major Business
 - 9.19.3 Cree LED LED Chips Product and Services
 - 9.19.4 Cree LED LED Chips Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.19.5 Cree LED Recent Developments/Updates
 - 9.19.6 Cree LED Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 LED Chips Industry Chain
- 10.2 LED Chips Upstream Analysis
 - 10.2.1 LED Chips Core Raw Materials
 - 10.2.2 Main Manufacturers of LED Chips Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 LED Chips Production Mode
- 10.6 LED Chips Procurement Model
- 10.7 LED Chips Industry Sales Model and Sales Channels
 - 10.7.1 LED Chips Sales Model
 - 10.7.2 LED Chips Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. World LED Chips Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World LED Chips Production Value by Region (2021-2026) & (USD Million)
- Table 3. World LED Chips Production Value by Region (2027-2032) & (USD Million)
- Table 4. World LED Chips Production Value Market Share by Region (2021-2026)
- Table 5. World LED Chips Production Value Market Share by Region (2027-2032)
- Table 6. World LED Chips Production by Region (2021-2026) & (Billion Units)
- Table 7. World LED Chips Production by Region (2027-2032) & (Billion Units)
- Table 8. World LED Chips Production Market Share by Region (2021-2026)
- Table 9. World LED Chips Production Market Share by Region (2027-2032)
- Table 10. World LED Chips Average Price by Region (2021-2026) & (US\$/k units)
- Table 11. World LED Chips Average Price by Region (2027-2032) & (US\$/k units)
- Table 12. LED Chips Major Market Trends
- Table 13. World LED Chips Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Billion Units)
- Table 14. World LED Chips Consumption by Region (2021-2026) & (Billion Units)
- Table 15. World LED Chips Consumption Forecast by Region (2027-2032) & (Billion Units)
- Table 16. World LED Chips Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key LED Chips Producers in 2025
- Table 18. World LED Chips Production by Manufacturer (2021-2026) & (Billion Units)
- Table 19. Production Market Share of Key LED Chips Producers in 2025
- Table 20. World LED Chips Average Price by Manufacturer (2021-2026) & (US\$/k units)
- Table 21. Global LED Chips Company Evaluation Quadrant
- Table 22. World LED Chips Industry Rank of Major Manufacturers, Based on Production Value in 2025
- Table 23. Head Office and LED Chips Production Site of Key Manufacturer
- Table 24. LED Chips Market: Company Product Type Footprint
- Table 25. LED Chips Market: Company Product Application Footprint
- Table 26. LED Chips Competitive Factors
- Table 27. LED Chips New Entrant and Capacity Expansion Plans
- Table 28. LED Chips Mergers & Acquisitions Activity
- Table 29. United States VS China LED Chips Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

- Table 30. United States VS China LED Chips Production Comparison, (2021 & 2025 & 2032) & (Billion Units)
- Table 31. United States VS China LED Chips Consumption Comparison, (2021 & 2025 & 2032) & (Billion Units)
- Table 32. United States Based LED Chips Manufacturers, Headquarters and Production Site (States, Country)
- Table 33. United States Based Manufacturers LED Chips Production Value, (2021-2026) & (USD Million)
- Table 34. United States Based Manufacturers LED Chips Production Value Market Share (2021-2026)
- Table 35. United States Based Manufacturers LED Chips Production (2021-2026) & (Billion Units)
- Table 36. United States Based Manufacturers LED Chips Production Market Share (2021-2026)
- Table 37. China Based LED Chips Manufacturers, Headquarters and Production Site (Province, Country)
- Table 38. China Based Manufacturers LED Chips Production Value, (2021-2026) & (USD Million)
- Table 39. China Based Manufacturers LED Chips Production Value Market Share (2021-2026)
- Table 40. China Based Manufacturers LED Chips Production, (2021-2026) & (Billion Units)
- Table 41. China Based Manufacturers LED Chips Production Market Share (2021-2026)
- Table 42. Rest of World Based LED Chips Manufacturers, Headquarters and Production Site (State, Country)
- Table 43. Rest of World Based Manufacturers LED Chips Production Value, (2021-2026) & (USD Million)
- Table 44. Rest of World Based Manufacturers LED Chips Production Value Market Share (2021-2026)
- Table 45. Rest of World Based Manufacturers LED Chips Production, (2021-2026) & (Billion Units)
- Table 46. Rest of World Based Manufacturers LED Chips Production Market Share (2021-2026)
- Table 47. World LED Chips Production Value by Type, (USD Million), 2021 & 2025 & 2032
- Table 48. World LED Chips Production by Type (2021-2026) & (Billion Units)
- Table 49. World LED Chips Production by Type (2027-2032) & (Billion Units)
- Table 50. World LED Chips Production Value by Type (2021-2026) & (USD Million)
- Table 51. World LED Chips Production Value by Type (2027-2032) & (USD Million)

Table 52. World LED Chips Average Price by Type (2021-2026) & (US\$/k units)

Table 53. World LED Chips Average Price by Type (2027-2032) & (US\$/k units)

Table 54. World LED Chips Production Value by Power, (USD Million), 2021 & 2025 & 2032

Table 55. World LED Chips Production by Power (2021-2026) & (Billion Units)

Table 56. World LED Chips Production by Power (2027-2032) & (Billion Units)

Table 57. World LED Chips Production Value by Power (2021-2026) & (USD Million)

Table 58. World LED Chips Production Value by Power (2027-2032) & (USD Million)

Table 59. World LED Chips Average Price by Power (2021-2026) & (US\$/k units)

Table 60. World LED Chips Average Price by Power (2027-2032) & (US\$/k units)

Table 61. World LED Chips Production Value by Materials, (USD Million), 2021 & 2025 & 2032

Table 62. World LED Chips Production by Materials (2021-2026) & (Billion Units)

Table 63. World LED Chips Production by Materials (2027-2032) & (Billion Units)

Table 64. World LED Chips Production Value by Materials (2021-2026) & (USD Million)

Table 65. World LED Chips Production Value by Materials (2027-2032) & (USD Million)

Table 66. World LED Chips Average Price by Materials (2021-2026) & (US\$/k units)

Table 67. World LED Chips Average Price by Materials (2027-2032) & (US\$/k units)

Table 68. World LED Chips Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World LED Chips Production by Application (2021-2026) & (Billion Units)

Table 70. World LED Chips Production by Application (2027-2032) & (Billion Units)

Table 71. World LED Chips Production Value by Application (2021-2026) & (USD Million)

Table 72. World LED Chips Production Value by Application (2027-2032) & (USD Million)

Table 73. World LED Chips Average Price by Application (2021-2026) & (US\$/k units)

Table 74. World LED Chips Average Price by Application (2027-2032) & (US\$/k units)

Table 75. Sanan Optoelectronics Basic Information, Manufacturing Base and Competitors

Table 76. Sanan Optoelectronics Major Business

Table 77. Sanan Optoelectronics LED Chips Product and Services

Table 78. Sanan Optoelectronics LED Chips Production (Billion Units), Price (US\$/k units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Sanan Optoelectronics Recent Developments/Updates

Table 80. Sanan Optoelectronics Competitive Strengths & Weaknesses

Table 81. Shenzhen Mtc Basic Information, Manufacturing Base and Competitors

Table 82. Shenzhen Mtc Major Business

Table 83. Shenzhen Mtc LED Chips Product and Services

- Table 84. Shenzhen Mtc LED Chips Production (Billion Units), Price (US\$/k units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 85. Shenzhen Mtc Recent Developments/Updates
- Table 86. Shenzhen Mtc Competitive Strengths & Weaknesses
- Table 87. BOE HC SemiTek Basic Information, Manufacturing Base and Competitors
- Table 88. BOE HC SemiTek Major Business
- Table 89. BOE HC SemiTek LED Chips Product and Services
- Table 90. BOE HC SemiTek LED Chips Production (Billion Units), Price (US\$/k units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 91. BOE HC SemiTek Recent Developments/Updates
- Table 92. BOE HC SemiTek Competitive Strengths & Weaknesses
- Table 93. Epistar Basic Information, Manufacturing Base and Competitors
- Table 94. Epistar Major Business
- Table 95. Epistar LED Chips Product and Services
- Table 96. Epistar LED Chips Production (Billion Units), Price (US\$/k units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 97. Epistar Recent Developments/Updates
- Table 98. Epistar Competitive Strengths & Weaknesses
- Table 99. Jiangsu Azure Basic Information, Manufacturing Base and Competitors
- Table 100. Jiangsu Azure Major Business
- Table 101. Jiangsu Azure LED Chips Product and Services
- Table 102. Jiangsu Azure LED Chips Production (Billion Units), Price (US\$/k units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 103. Jiangsu Azure Recent Developments/Updates
- Table 104. Jiangsu Azure Competitive Strengths & Weaknesses
- Table 105. Kfeslightingco., Ltd Basic Information, Manufacturing Base and Competitors
- Table 106. Kfeslightingco., Ltd Major Business
- Table 107. Kfeslightingco., Ltd LED Chips Product and Services
- Table 108. Kfeslightingco., Ltd LED Chips Production (Billion Units), Price (US\$/k units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 109. Kfeslightingco., Ltd Recent Developments/Updates
- Table 110. Kfeslightingco., Ltd Competitive Strengths & Weaknesses
- Table 111. Focus Lightings Tech Basic Information, Manufacturing Base and Competitors
- Table 112. Focus Lightings Tech Major Business
- Table 113. Focus Lightings Tech LED Chips Product and Services
- Table 114. Focus Lightings Tech LED Chips Production (Billion Units), Price (US\$/k units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 115. Focus Lightings Tech Recent Developments/Updates

- Table 116. Focus Lightings Tech Competitive Strengths & Weaknesses
- Table 117. Hangzhou Silan Microelectronics Basic Information, Manufacturing Base and Competitors
- Table 118. Hangzhou Silan Microelectronics Major Business
- Table 119. Hangzhou Silan Microelectronics LED Chips Product and Services
- Table 120. Hangzhou Silan Microelectronics LED Chips Production (Billion Units), Price (US\$/k units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 121. Hangzhou Silan Microelectronics Recent Developments/Updates
- Table 122. Hangzhou Silan Microelectronics Competitive Strengths & Weaknesses
- Table 123. Fujian Zhaoyuan Photoelectric Basic Information, Manufacturing Base and Competitors
- Table 124. Fujian Zhaoyuan Photoelectric Major Business
- Table 125. Fujian Zhaoyuan Photoelectric LED Chips Product and Services
- Table 126. Fujian Zhaoyuan Photoelectric LED Chips Production (Billion Units), Price (US\$/k units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 127. Fujian Zhaoyuan Photoelectric Recent Developments/Updates
- Table 128. Fujian Zhaoyuan Photoelectric Competitive Strengths & Weaknesses
- Table 129. ELEMEDIA TECHNOLOGY Basic Information, Manufacturing Base and Competitors
- Table 130. ELEMEDIA TECHNOLOGY Major Business
- Table 131. ELEMEDIA TECHNOLOGY LED Chips Product and Services
- Table 132. ELEMEDIA TECHNOLOGY LED Chips Production (Billion Units), Price (US\$/k units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 133. ELEMEDIA TECHNOLOGY Recent Developments/Updates
- Table 134. ELEMEDIA TECHNOLOGY Competitive Strengths & Weaknesses
- Table 135. Xiamen Changelight Basic Information, Manufacturing Base and Competitors
- Table 136. Xiamen Changelight Major Business
- Table 137. Xiamen Changelight LED Chips Product and Services
- Table 138. Xiamen Changelight LED Chips Production (Billion Units), Price (US\$/k units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 139. Xiamen Changelight Recent Developments/Updates
- Table 140. Xiamen Changelight Competitive Strengths & Weaknesses
- Table 141. Hua Lei photoelectric Basic Information, Manufacturing Base and Competitors
- Table 142. Hua Lei photoelectric Major Business

- Table 143. Hua Lei photoelectric LED Chips Product and Services
- Table 144. Hua Lei photoelectric LED Chips Production (Billion Units), Price (US\$/k units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 145. Hua Lei photoelectric Recent Developments/Updates
- Table 146. Hua Lei photoelectric Competitive Strengths & Weaknesses
- Table 147. Foshan Nationstar Optoelectronics Basic Information, Manufacturing Base and Competitors
- Table 148. Foshan Nationstar Optoelectronics Major Business
- Table 149. Foshan Nationstar Optoelectronics LED Chips Product and Services
- Table 150. Foshan Nationstar Optoelectronics LED Chips Production (Billion Units), Price (US\$/k units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 151. Foshan Nationstar Optoelectronics Recent Developments/Updates
- Table 152. Foshan Nationstar Optoelectronics Competitive Strengths & Weaknesses
- Table 153. Nichia Basic Information, Manufacturing Base and Competitors
- Table 154. Nichia Major Business
- Table 155. Nichia LED Chips Product and Services
- Table 156. Nichia LED Chips Production (Billion Units), Price (US\$/k units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 157. Nichia Recent Developments/Updates
- Table 158. Nichia Competitive Strengths & Weaknesses
- Table 159. Samsung Basic Information, Manufacturing Base and Competitors
- Table 160. Samsung Major Business
- Table 161. Samsung LED Chips Product and Services
- Table 162. Samsung LED Chips Production (Billion Units), Price (US\$/k units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 163. Samsung Recent Developments/Updates
- Table 164. Samsung Competitive Strengths & Weaknesses
- Table 165. Seoul Semiconductor Basic Information, Manufacturing Base and Competitors
- Table 166. Seoul Semiconductor Major Business
- Table 167. Seoul Semiconductor LED Chips Product and Services
- Table 168. Seoul Semiconductor LED Chips Production (Billion Units), Price (US\$/k units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 169. Seoul Semiconductor Recent Developments/Updates
- Table 170. Seoul Semiconductor Competitive Strengths & Weaknesses
- Table 171. AMS Osram Basic Information, Manufacturing Base and Competitors
- Table 172. AMS Osram Major Business
- Table 173. AMS Osram LED Chips Product and Services

- Table 174. AMS Osram LED Chips Production (Billion Units), Price (US\$/k units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 175. AMS Osram Recent Developments/Updates
- Table 176. AMS Osram Competitive Strengths & Weaknesses
- Table 177. Lumileds Basic Information, Manufacturing Base and Competitors
- Table 178. Lumileds Major Business
- Table 179. Lumileds LED Chips Product and Services
- Table 180. Lumileds LED Chips Production (Billion Units), Price (US\$/k units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 181. Lumileds Recent Developments/Updates
- Table 182. Lumileds Competitive Strengths & Weaknesses
- Table 183. Cree LED Basic Information, Manufacturing Base and Competitors
- Table 184. Cree LED Major Business
- Table 185. Cree LED LED Chips Product and Services
- Table 186. Cree LED LED Chips Production (Billion Units), Price (US\$/k units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 187. Cree LED Recent Developments/Updates
- Table 188. Cree LED Competitive Strengths & Weaknesses
- Table 189. Global Key Players of LED Chips Upstream (Raw Materials)
- Table 190. Global LED Chips Typical Customers
- Table 191. LED Chips Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. LED Chips Picture

Figure 2. World LED Chips Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World LED Chips Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World LED Chips Production (2021-2032) & (Billion Units)

Figure 5. World LED Chips Average Price (2021-2032) & (US\$/k units)

Figure 6. World LED Chips Production Value Market Share by Region (2021-2032)

Figure 7. World LED Chips Production Market Share by Region (2021-2032)

Figure 8. North America LED Chips Production (2021-2032) & (Billion Units)

Figure 9. Europe LED Chips Production (2021-2032) & (Billion Units)

Figure 10. China LED Chips Production (2021-2032) & (Billion Units)

Figure 11. Japan LED Chips Production (2021-2032) & (Billion Units)

Figure 12. South Korea LED Chips Production (2021-2032) & (Billion Units)

Figure 13. LED Chips Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World LED Chips Consumption (2021-2032) & (Billion Units)

Figure 16. World LED Chips Consumption Market Share by Region (2021-2032)

Figure 17. United States LED Chips Consumption (2021-2032) & (Billion Units)

Figure 18. China LED Chips Consumption (2021-2032) & (Billion Units)

Figure 19. Europe LED Chips Consumption (2021-2032) & (Billion Units)

Figure 20. Japan LED Chips Consumption (2021-2032) & (Billion Units)

Figure 21. South Korea LED Chips Consumption (2021-2032) & (Billion Units)

Figure 22. ASEAN LED Chips Consumption (2021-2032) & (Billion Units)

Figure 23. India LED Chips Consumption (2021-2032) & (Billion Units)

Figure 24. Producer Shipments of LED Chips by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for LED Chips Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for LED Chips Markets in 2025

Figure 27. United States VS China: LED Chips Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: LED Chips Production Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: LED Chips Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States Based Manufacturers LED Chips Production Market Share 2025

- Figure 31. China Based Manufacturers LED Chips Production Market Share 2025
- Figure 32. Rest of World Based Manufacturers LED Chips Production Market Share 2025
- Figure 33. World LED Chips Production Value by Type, (USD Million), 2021 & 2025 & 2032
- Figure 34. World LED Chips Production Value Market Share by Type in 2025
- Figure 35. Lateral Chip LED
- Figure 36. Vertical Chip LED
- Figure 37. Flip Chip LED
- Figure 38. World LED Chips Production Market Share by Type (2021-2032)
- Figure 39. World LED Chips Production Value Market Share by Type (2021-2032)
- Figure 40. World LED Chips Average Price by Type (2021-2032) & (US\$/k units)
- Figure 41. World LED Chips Production Value by Power, (USD Million), 2021 & 2025 & 2032
- Figure 42. World LED Chips Production Value Market Share by Power in 2025
- Figure 43. Low Power (?0.5W)
- Figure 44. Medium Power (0.5-1W)
- Figure 45. High Power (?1W)
- Figure 46. World LED Chips Production Market Share by Power (2021-2032)
- Figure 47. World LED Chips Production Value Market Share by Power (2021-2032)
- Figure 48. World LED Chips Average Price by Power (2021-2032) & (US\$/k units)
- Figure 49. World LED Chips Production Value by Materials, (USD Million), 2021 & 2025 & 2032
- Figure 50. World LED Chips Production Value Market Share by Materials in 2025
- Figure 51. GaN
- Figure 52. GaAs
- Figure 53. Others
- Figure 54. World LED Chips Production Market Share by Materials (2021-2032)
- Figure 55. World LED Chips Production Value Market Share by Materials (2021-2032)
- Figure 56. World LED Chips Average Price by Materials (2021-2032) & (US\$/k units)
- Figure 57. World LED Chips Production Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 58. World LED Chips Production Value Market Share by Application in 2025
- Figure 59. General Lighting
- Figure 60. Backlighting
- Figure 61. Direct Display & Screens
- Figure 62. Automotive Lighting
- Figure 63. Consumer Electronics & IoT
- Figure 64. Others

- Figure 65. World LED Chips Production Market Share by Application (2021-2032)
- Figure 66. World LED Chips Production Value Market Share by Application (2021-2032)
- Figure 67. World LED Chips Average Price by Application (2021-2032) & (US\$/k units)
- Figure 68. LED Chips Industry Chain
- Figure 69. LED Chips Procurement Model
- Figure 70. LED Chips Sales Model
- Figure 71. LED Chips Sales Channels, Direct Sales, and Distribution
- Figure 72. Methodology
- Figure 73. Research Process and Data Source

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