

# Global Piezo-On-Insulator (POI) 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 Piezo-On-Insulator (POI) market size was valued at US\$ 276 million in 2025 and is forecast to a readjusted size of US\$ 2119 million by 2032 with a CAGR of 36.0% during review period.

In 2025, global Piezo-On-Insulator (POI) production reached approximately 68,454 Pcs, with an average global market price of around US\$3,918 per Pcs. Piezo-On-Insulator (POI) is a material structure with significant application value in the fields of semiconductor. Structurally, it mainly consists of three layers. The bottom layer is typically high - resistivity silicon (or other suitable insulating substrate materials). The middle layer is a buried oxide layer, which functions as isolation and electrical - property adjustment. The top layer is a thin and uniform single - crystal piezoelectric material. This structural design endows POI with excellent electrical insulation and piezoelectric properties.

Piezoelectric-on-Insulator (POI), as a key substrate material for high-performance filters in the 5G RF front end, is seeing its global market accelerate in formation alongside the deepening commercialization of 5G. Market development trends closely track the requirements of 5G/6G communications for higher operating frequencies, wider bandwidths, and lower temperature sensitivity in filters, driving POI to evolve toward the use of diverse piezoelectric materials, larger wafer sizes, and higher levels of integration. Growth opportunities mainly arise from profound changes in smartphone front-end modules, the wider adoption of integrated components such as antenna multiplexers, and the expansion into emerging applications including high-frequency ultrasonic transducers and self-powered sensors.

Leading players include France's Soitec and China's Jinan Jingzheng Electronics (NANOLN). Centered on its proprietary Smart Cut<sup>®</sup> technology, Soitec has long focused on the R&D and manufacturing of optimized substrates. Its traditional flagship products are RF-SOI substrates for RF front-end applications. As 5G communications raised performance requirements for filters, Soitec launched a new Piezoelectric-on-Insulator (POI) substrate in 2019, extending its materials platform from SOI into the piezoelectric domain. Soitec has now achieved mass-production capability and is in a capacity ramp-up phase, with a maximum capacity of up to 700,000 wafers per year. Jinan Jingzheng Electronics (NANOLN) focuses on the R&D and industrialization of nano-thickness electro-optic and piezoelectric single-crystal thin-film materials. After years of technological development, the company became the first in the industry to develop 3-inch nano-thickness lithium niobate thin films in 2014 and achieved volume production. At present, NANOLN is accelerating capacity expansion, with a production line for an annual output of 100,000 lithium niobate thin-film wafers about to commence operation.

This report is a detailed and comprehensive analysis for global Piezo-On-Insulator (POI) 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 Piezo-On-Insulator (POI) market size and forecasts, in consumption value (\$ Million), sales quantity (Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global Piezo-On-Insulator (POI) market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global Piezo-On-Insulator (POI) market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global Piezo-On-Insulator (POI) market shares of main players, shipments in revenue (\$ Million), sales quantity (Pcs), and ASP (US\$/Pcs), 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 Piezo-On-Insulator (POI)

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 Piezo-On-Insulator (POI) 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 Soitec (EPA: SOI, France), Jinan Jingzheng Electronics (NANOLN) (Private, China), Shanghai Novel Si Integration Technology (Private, China), Beijing Qinghe Jingyuan (Private, China), NGK Insulators (TYO: 5333, Japan), IOPTEE (Private, China), PAM Xiamen (Private, China), Partow Technologies (Private, USA), Alfa Chemistry (Private, USA), etc.

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

## Market Segmentation

Piezo-On-Insulator (POI) 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

Lithium Niobate on Insulator (LNOI)

Lithium Tantalate on Insulator (LTOI)

### Market segment by Size

4-inch

6-inch

Others

### Market segment by Piezo-layer Thickness

100nm-900nm

1?m~20?m

Others

### Market segment by Application

SAW Filters

Electro-Optic Modulators

Others

### Major players covered

Soitec (EPA: SOI, France)

Jinan Jingzheng Electronics (NANOLN) (Private, China)

Shanghai Novel Si Integration Technology (Private, China)

Beijing Qinghe Jingyuan (Private, China)

NGK Insulators (TYO: 5333, Japan)

IOPTEE (Private, China)

PAM Xiamen (Private, China)

Partow Technologies (Private, USA)

Alfa Chemistry (Private, USA)

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 Piezo-On-Insulator (POI) product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Piezo-On-Insulator (POI), with price, sales quantity, revenue, and global market share of Piezo-On-Insulator (POI) from 2021 to 2026.

Chapter 3, the Piezo-On-Insulator (POI) competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Piezo-On-Insulator (POI) 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 Piezo-On-Insulator (POI) 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 Piezo-On-Insulator (POI).

Chapter 14 and 15, to describe Piezo-On-Insulator (POI) sales channel, distributors, customers, research findings and conclusion.

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