

# Global POI Substrate Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global POI Substrate market size is expected to reach \$ 1943 million by 2032, rising at a market growth of 34.1% CAGR during the forecast period (2026-2032). In 2025, global POI Substrate production reached approximately 68,454 Pcs, with an average global market price of around US\$3,918 per Pcs. The piezo-on-insulator (POI) substrate is an emerging piezoelectric single-crystal composite thin film structural material. The POI substrate is made of three layers: a piezoelectric material, a buried oxide and a silicon layer. The buried oxide selects and guides only high velocity waves, allowing to limit the losses and to ensure a very high signal selectivity.

As a key material enabling high-frequency, high-performance filtering in 5G RF front-end modules, POI substrates are seeing their global market take shape at an accelerating pace alongside the deepening commercialization of 5G. Market development trends closely follow the requirements of 5G/6G communications for higher operating frequencies, wider bandwidths, and lower temperature sensitivity in filters, driving POI technology toward the adoption of diverse piezoelectric materials, larger wafer sizes, and higher levels of integration. Growth opportunities are mainly driven by profound changes in smartphone RF front-end architectures, the increasing penetration of integrated components such as antenna multiplexers, and the expansion of emerging applications including high-frequency ultrasonic transducers and self-powered sensors.

Leading companies in this field include France-based Soitec and China-based Jinan Jingzheng Electronics. Centered on its proprietary Smart Cut<sup>®</sup> technology, Soitec has long focused on the R&D and manufacturing of optimized engineered substrates. Its traditional strength lies in RF-SOI substrates for RF front-end applications. In response to rising performance requirements for filters driven by 5G, Soitec launched its Piezoelectric-on-Insulator (POI) substrate in 2019, extending its materials platform from SOI into the piezoelectric domain. POI substrates are manufactured at Soitec's

BERNIN 3 facility in France, which is currently in a capacity ramp-up phase with a maximum output of up to 700,000 wafers per year. Jinan Jingzheng Electronics 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 achieve volume production. At present, Jinan Jingzheng Electronics is accelerating capacity expansion, with a production line capable of producing 100,000 lithium niobate thin-film wafers per year about to commence operation.

This report studies the global POI Substrate production, demand, key manufacturers, and key regions.

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

### **Highlights and key features of the study**

Global POI Substrate total production and demand, 2021-2032, (Pcs)

Global POI Substrate total production value, 2021-2032, (USD Million)

Global POI Substrate production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Pcs), (based on production site)

Global POI Substrate consumption by region & country, CAGR, 2021-2032 & (Pcs)

U.S. VS China: POI Substrate domestic production, consumption, key domestic manufacturers and share

Global POI Substrate production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Pcs)

Global POI Substrate production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Pcs)

Global POI Substrate production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Pcs)

This report profiles key players in the global POI Substrate 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 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), IOPTTE (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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World POI Substrate market

**Detailed Segmentation:**

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

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global POI Substrate Market, Segmentation by Type:

Lithium Niobate on Insulator (LNOI)

Lithium Tantalate on Insulator (LTOI)

Global POI Substrate Market, Segmentation by Size:

4-inch

6-inch

Others

#### Global POI Substrate Market, Segmentation by Piezo-layer Thickness:

100nm-900nm

1?m~20?m

Others

#### Global POI Substrate Market, Segmentation by Application:

SAW Filters

Electro-Optic Modulators

Others

#### **Companies Profiled:**

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)

**Key Questions Answered:**

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

## Contents

### 1 SUPPLY SUMMARY

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

### 2 DEMAND SUMMARY

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

### 3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World POI Substrate Production Value by Manufacturer (2021-2026)
- 3.2 World POI Substrate Production by Manufacturer (2021-2026)

- 3.3 World POI Substrate Average Price by Manufacturer (2021-2026)
- 3.4 POI Substrate Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
  - 3.5.1 Global POI Substrate Industry Rank of Major Manufacturers
  - 3.5.2 Global Concentration Ratios (CR4) for POI Substrate in 2025
  - 3.5.3 Global Concentration Ratios (CR8) for POI Substrate in 2025
- 3.6 POI Substrate Market: Overall Company Footprint Analysis
  - 3.6.1 POI Substrate Market: Region Footprint
  - 3.6.2 POI Substrate Market: Company Product Type Footprint
  - 3.6.3 POI Substrate 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: POI Substrate Production Value Comparison
  - 4.1.1 United States VS China: POI Substrate Production Value Comparison (2021 & 2025 & 2032)
  - 4.1.2 United States VS China: POI Substrate Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: POI Substrate Production Comparison
  - 4.2.1 United States VS China: POI Substrate Production Comparison (2021 & 2025 & 2032)
  - 4.2.2 United States VS China: POI Substrate Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: POI Substrate Consumption Comparison
  - 4.3.1 United States VS China: POI Substrate Consumption Comparison (2021 & 2025 & 2032)
  - 4.3.2 United States VS China: POI Substrate Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based POI Substrate Manufacturers and Market Share, 2021-2026
  - 4.4.1 United States Based POI Substrate Manufacturers, Headquarters and Production Site (States, Country)
  - 4.4.2 United States Based Manufacturers POI Substrate Production Value (2021-2026)

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

## **5 MARKET ANALYSIS BY TYPE**

- 5.1 World POI Substrate Market Size Overview by Type: 2021 VS 2025 VS 2032
- 5.2 Segment Introduction by Type
  - 5.2.1 Lithium Niobate on Insulator (LNOI)
  - 5.2.2 Lithium Tantalate on Insulator (LTOI)
- 5.3 Market Segment by Type
  - 5.3.1 World POI Substrate Production by Type (2021-2032)
  - 5.3.2 World POI Substrate Production Value by Type (2021-2032)
  - 5.3.3 World POI Substrate Average Price by Type (2021-2032)

## **6 MARKET ANALYSIS BY SIZE**

- 6.1 World POI Substrate Market Size Overview by Size: 2021 VS 2025 VS 2032
- 6.2 Segment Introduction by Size
  - 6.2.1 4-inch
  - 6.2.2 6-inch
  - 6.2.3 Others
- 6.3 Market Segment by Size
  - 6.3.1 World POI Substrate Production by Size (2021-2032)
  - 6.3.2 World POI Substrate Production Value by Size (2021-2032)
  - 6.3.3 World POI Substrate Average Price by Size (2021-2032)

## **7 MARKET ANALYSIS BY PIEZO-LAYER THICKNESS**

- 7.1 World POI Substrate Market Size Overview by Piezo-layer Thickness: 2021 VS

2025 VS 2032

7.2 Segment Introduction by Piezo-layer Thickness

7.2.1 100nm-900nm

7.2.2 1?m~20?m

7.2.3 Others

7.3 Market Segment by Piezo-layer Thickness

7.3.1 World POI Substrate Production by Piezo-layer Thickness (2021-2032)

7.3.2 World POI Substrate Production Value by Piezo-layer Thickness (2021-2032)

7.3.3 World POI Substrate Average Price by Piezo-layer Thickness (2021-2032)

## **8 MARKET ANALYSIS BY APPLICATION**

8.1 World POI Substrate Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 SAW Filters

8.2.2 Electro-Optic Modulators

8.2.3 Others

8.3 Market Segment by Application

8.3.1 World POI Substrate Production by Application (2021-2032)

8.3.2 World POI Substrate Production Value by Application (2021-2032)

8.3.3 World POI Substrate Average Price by Application (2021-2032)

## **9 COMPANY PROFILES**

9.1 Soitec (EPA: SOI, France)

9.1.1 Soitec (EPA: SOI, France) Details

9.1.2 Soitec (EPA: SOI, France) Major Business

9.1.3 Soitec (EPA: SOI, France) POI Substrate Product and Services

9.1.4 Soitec (EPA: SOI, France) POI Substrate Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Soitec (EPA: SOI, France) Recent Developments/Updates

9.1.6 Soitec (EPA: SOI, France) Competitive Strengths & Weaknesses

9.2 Jinan Jingzheng Electronics (NANOLN) (Private, China)

9.2.1 Jinan Jingzheng Electronics (NANOLN) (Private, China) Details

9.2.2 Jinan Jingzheng Electronics (NANOLN) (Private, China) Major Business

9.2.3 Jinan Jingzheng Electronics (NANOLN) (Private, China) POI Substrate Product and Services

9.2.4 Jinan Jingzheng Electronics (NANOLN) (Private, China) POI Substrate Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.2.5 Jinan Jingzheng Electronics (NANOLN) (Private, China) Recent Developments/Updates
- 9.2.6 Jinan Jingzheng Electronics (NANOLN) (Private, China) Competitive Strengths & Weaknesses
- 9.3 Shanghai Novel Si Integration Technology (Private, China)
  - 9.3.1 Shanghai Novel Si Integration Technology (Private, China) Details
  - 9.3.2 Shanghai Novel Si Integration Technology (Private, China) Major Business
  - 9.3.3 Shanghai Novel Si Integration Technology (Private, China) POI Substrate Product and Services
  - 9.3.4 Shanghai Novel Si Integration Technology (Private, China) POI Substrate Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.3.5 Shanghai Novel Si Integration Technology (Private, China) Recent Developments/Updates
  - 9.3.6 Shanghai Novel Si Integration Technology (Private, China) Competitive Strengths & Weaknesses
- 9.4 Beijing Qinghe Jingyuan (Private, China)
  - 9.4.1 Beijing Qinghe Jingyuan (Private, China) Details
  - 9.4.2 Beijing Qinghe Jingyuan (Private, China) Major Business
  - 9.4.3 Beijing Qinghe Jingyuan (Private, China) POI Substrate Product and Services
  - 9.4.4 Beijing Qinghe Jingyuan (Private, China) POI Substrate Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.4.5 Beijing Qinghe Jingyuan (Private, China) Recent Developments/Updates
  - 9.4.6 Beijing Qinghe Jingyuan (Private, China) Competitive Strengths & Weaknesses
- 9.5 NGK Insulators (TYO: 5333, Japan)
  - 9.5.1 NGK Insulators (TYO: 5333, Japan) Details
  - 9.5.2 NGK Insulators (TYO: 5333, Japan) Major Business
  - 9.5.3 NGK Insulators (TYO: 5333, Japan) POI Substrate Product and Services
  - 9.5.4 NGK Insulators (TYO: 5333, Japan) POI Substrate Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.5.5 NGK Insulators (TYO: 5333, Japan) Recent Developments/Updates
  - 9.5.6 NGK Insulators (TYO: 5333, Japan) Competitive Strengths & Weaknesses
- 9.6 IOPTTE (Private, China)
  - 9.6.1 IOPTTE (Private, China) Details
  - 9.6.2 IOPTTE (Private, China) Major Business
  - 9.6.3 IOPTTE (Private, China) POI Substrate Product and Services
  - 9.6.4 IOPTTE (Private, China) POI Substrate Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.6.5 IOPTTE (Private, China) Recent Developments/Updates
  - 9.6.6 IOPTTE (Private, China) Competitive Strengths & Weaknesses

## 9.7 PAM Xiamen (Private, China)

9.7.1 PAM Xiamen (Private, China) Details

9.7.2 PAM Xiamen (Private, China) Major Business

9.7.3 PAM Xiamen (Private, China) POI Substrate Product and Services

9.7.4 PAM Xiamen (Private, China) POI Substrate Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 PAM Xiamen (Private, China) Recent Developments/Updates

9.7.6 PAM Xiamen (Private, China) Competitive Strengths & Weaknesses

## 9.8 Partow Technologies (Private, USA)

9.8.1 Partow Technologies (Private, USA) Details

9.8.2 Partow Technologies (Private, USA) Major Business

9.8.3 Partow Technologies (Private, USA) POI Substrate Product and Services

9.8.4 Partow Technologies (Private, USA) POI Substrate Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Partow Technologies (Private, USA) Recent Developments/Updates

9.8.6 Partow Technologies (Private, USA) Competitive Strengths & Weaknesses

## 9.9 Alfa Chemistry (Private, USA)

9.9.1 Alfa Chemistry (Private, USA) Details

9.9.2 Alfa Chemistry (Private, USA) Major Business

9.9.3 Alfa Chemistry (Private, USA) POI Substrate Product and Services

9.9.4 Alfa Chemistry (Private, USA) POI Substrate Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Alfa Chemistry (Private, USA) Recent Developments/Updates

9.9.6 Alfa Chemistry (Private, USA) Competitive Strengths & Weaknesses

## 10 INDUSTRY CHAIN ANALYSIS

### 10.1 POI Substrate Industry Chain

### 10.2 POI Substrate Upstream Analysis

10.2.1 POI Substrate Core Raw Materials

10.2.2 Main Manufacturers of POI Substrate Core Raw Materials

### 10.3 Midstream Analysis

### 10.4 Downstream Analysis

### 10.5 POI Substrate Production Mode

### 10.6 POI Substrate Procurement Model

### 10.7 POI Substrate Industry Sales Model and Sales Channels

10.7.1 POI Substrate Sales Model

10.7.2 POI Substrate 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 POI Substrate Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World POI Substrate Production Value by Region (2021-2026) & (USD Million)

Table 3. World POI Substrate Production Value by Region (2027-2032) & (USD Million)

Table 4. World POI Substrate Production Value Market Share by Region (2021-2026)

Table 5. World POI Substrate Production Value Market Share by Region (2027-2032)

Table 6. World POI Substrate Production by Region (2021-2026) & (Pcs)

Table 7. World POI Substrate Production by Region (2027-2032) & (Pcs)

Table 8. World POI Substrate Production Market Share by Region (2021-2026)

Table 9. World POI Substrate Production Market Share by Region (2027-2032)

Table 10. World POI Substrate Average Price by Region (2021-2026) & (US\$/Pcs)

Table 11. World POI Substrate Average Price by Region (2027-2032) & (US\$/Pcs)

Table 12. POI Substrate Major Market Trends

Table 13. World POI Substrate Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Pcs)

Table 14. World POI Substrate Consumption by Region (2021-2026) & (Pcs)

Table 15. World POI Substrate Consumption Forecast by Region (2027-2032) & (Pcs)

Table 16. World POI Substrate Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key POI Substrate Producers in 2025

Table 18. World POI Substrate Production by Manufacturer (2021-2026) & (Pcs)

Table 19. Production Market Share of Key POI Substrate Producers in 2025

Table 20. World POI Substrate Average Price by Manufacturer (2021-2026) & (US\$/Pcs)

Table 21. Global POI Substrate Company Evaluation Quadrant

Table 22. World POI Substrate Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and POI Substrate Production Site of Key Manufacturer

Table 24. POI Substrate Market: Company Product Type Footprint

Table 25. POI Substrate Market: Company Product Application Footprint

Table 26. POI Substrate Competitive Factors

Table 27. POI Substrate New Entrant and Capacity Expansion Plans

Table 28. POI Substrate Mergers & Acquisitions Activity

Table 29. United States VS China POI Substrate Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China POI Substrate Production Comparison, (2021 & 2025 & 2032) & (Pcs)

Table 31. United States VS China POI Substrate Consumption Comparison, (2021 & 2025 & 2032) & (Pcs)

Table 32. United States Based POI Substrate Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers POI Substrate Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers POI Substrate Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers POI Substrate Production (2021-2026) & (Pcs)

Table 36. United States Based Manufacturers POI Substrate Production Market Share (2021-2026)

Table 37. China Based POI Substrate Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers POI Substrate Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers POI Substrate Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers POI Substrate Production, (2021-2026) & (Pcs)

Table 41. China Based Manufacturers POI Substrate Production Market Share (2021-2026)

Table 42. Rest of World Based POI Substrate Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers POI Substrate Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers POI Substrate Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers POI Substrate Production, (2021-2026) & (Pcs)

Table 46. Rest of World Based Manufacturers POI Substrate Production Market Share (2021-2026)

Table 47. World POI Substrate Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World POI Substrate Production by Type (2021-2026) & (Pcs)

Table 49. World POI Substrate Production by Type (2027-2032) & (Pcs)

Table 50. World POI Substrate Production Value by Type (2021-2026) & (USD Million)

Table 51. World POI Substrate Production Value by Type (2027-2032) & (USD Million)

Table 52. World POI Substrate Average Price by Type (2021-2026) & (US\$/Pcs)

Table 53. World POI Substrate Average Price by Type (2027-2032) & (US\$/Pcs)

Table 54. World POI Substrate Production Value by Size, (USD Million), 2021 & 2025 & 2032

Table 55. World POI Substrate Production by Size (2021-2026) & (Pcs)

Table 56. World POI Substrate Production by Size (2027-2032) & (Pcs)

Table 57. World POI Substrate Production Value by Size (2021-2026) & (USD Million)

Table 58. World POI Substrate Production Value by Size (2027-2032) & (USD Million)

Table 59. World POI Substrate Average Price by Size (2021-2026) & (US\$/Pcs)

Table 60. World POI Substrate Average Price by Size (2027-2032) & (US\$/Pcs)

Table 61. World POI Substrate Production Value by Piezo-layer Thickness, (USD Million), 2021 & 2025 & 2032

Table 62. World POI Substrate Production by Piezo-layer Thickness (2021-2026) & (Pcs)

Table 63. World POI Substrate Production by Piezo-layer Thickness (2027-2032) & (Pcs)

Table 64. World POI Substrate Production Value by Piezo-layer Thickness (2021-2026) & (USD Million)

Table 65. World POI Substrate Production Value by Piezo-layer Thickness (2027-2032) & (USD Million)

Table 66. World POI Substrate Average Price by Piezo-layer Thickness (2021-2026) & (US\$/Pcs)

Table 67. World POI Substrate Average Price by Piezo-layer Thickness (2027-2032) & (US\$/Pcs)

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

Table 69. World POI Substrate Production by Application (2021-2026) & (Pcs)

Table 70. World POI Substrate Production by Application (2027-2032) & (Pcs)

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

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

Table 73. World POI Substrate Average Price by Application (2021-2026) & (US\$/Pcs)

Table 74. World POI Substrate Average Price by Application (2027-2032) & (US\$/Pcs)

Table 75. Soitec (EPA: SOI, France) Basic Information, Manufacturing Base and Competitors

Table 76. Soitec (EPA: SOI, France) Major Business

Table 77. Soitec (EPA: SOI, France) POI Substrate Product and Services

Table 78. Soitec (EPA: SOI, France) POI Substrate Production (Pcs), Price (US\$/Pcs),

Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Soitec (EPA: SOI, France) Recent Developments/Updates

Table 80. Soitec (EPA: SOI, France) Competitive Strengths & Weaknesses

Table 81. Jinan Jingzheng Electronics (NANOLN) (Private, China) Basic Information, Manufacturing Base and Competitors

Table 82. Jinan Jingzheng Electronics (NANOLN) (Private, China) Major Business

Table 83. Jinan Jingzheng Electronics (NANOLN) (Private, China) POI Substrate Product and Services

Table 84. Jinan Jingzheng Electronics (NANOLN) (Private, China) POI Substrate Production (Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Jinan Jingzheng Electronics (NANOLN) (Private, China) Recent Developments/Updates

Table 86. Jinan Jingzheng Electronics (NANOLN) (Private, China) Competitive Strengths & Weaknesses

Table 87. Shanghai Novel Si Integration Technology (Private, China) Basic Information, Manufacturing Base and Competitors

Table 88. Shanghai Novel Si Integration Technology (Private, China) Major Business

Table 89. Shanghai Novel Si Integration Technology (Private, China) POI Substrate Product and Services

Table 90. Shanghai Novel Si Integration Technology (Private, China) POI Substrate Production (Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Shanghai Novel Si Integration Technology (Private, China) Recent Developments/Updates

Table 92. Shanghai Novel Si Integration Technology (Private, China) Competitive Strengths & Weaknesses

Table 93. Beijing Qinghe Jingyuan (Private, China) Basic Information, Manufacturing Base and Competitors

Table 94. Beijing Qinghe Jingyuan (Private, China) Major Business

Table 95. Beijing Qinghe Jingyuan (Private, China) POI Substrate Product and Services

Table 96. Beijing Qinghe Jingyuan (Private, China) POI Substrate Production (Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Beijing Qinghe Jingyuan (Private, China) Recent Developments/Updates

Table 98. Beijing Qinghe Jingyuan (Private, China) Competitive Strengths & Weaknesses

Table 99. NGK Insulators (TYO: 5333, Japan) Basic Information, Manufacturing Base and Competitors

Table 100. NGK Insulators (TYO: 5333, Japan) Major Business

Table 101. NGK Insulators (TYO: 5333, Japan) POI Substrate Product and Services

Table 102. NGK Insulators (TYO: 5333, Japan) POI Substrate Production (Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. NGK Insulators (TYO: 5333, Japan) Recent Developments/Updates

Table 104. NGK Insulators (TYO: 5333, Japan) Competitive Strengths & Weaknesses

Table 105. IOPTEE (Private, China) Basic Information, Manufacturing Base and Competitors

Table 106. IOPTEE (Private, China) Major Business

Table 107. IOPTEE (Private, China) POI Substrate Product and Services

Table 108. IOPTEE (Private, China) POI Substrate Production (Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. IOPTEE (Private, China) Recent Developments/Updates

Table 110. IOPTEE (Private, China) Competitive Strengths & Weaknesses

Table 111. PAM Xiamen (Private, China) Basic Information, Manufacturing Base and Competitors

Table 112. PAM Xiamen (Private, China) Major Business

Table 113. PAM Xiamen (Private, China) POI Substrate Product and Services

Table 114. PAM Xiamen (Private, China) POI Substrate Production (Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. PAM Xiamen (Private, China) Recent Developments/Updates

Table 116. PAM Xiamen (Private, China) Competitive Strengths & Weaknesses

Table 117. Partow Technologies (Private, USA) Basic Information, Manufacturing Base and Competitors

Table 118. Partow Technologies (Private, USA) Major Business

Table 119. Partow Technologies (Private, USA) POI Substrate Product and Services

Table 120. Partow Technologies (Private, USA) POI Substrate Production (Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Partow Technologies (Private, USA) Recent Developments/Updates

Table 122. Partow Technologies (Private, USA) Competitive Strengths & Weaknesses

Table 123. Alfa Chemistry (Private, USA) Basic Information, Manufacturing Base and Competitors

Table 124. Alfa Chemistry (Private, USA) Major Business

Table 125. Alfa Chemistry (Private, USA) POI Substrate Product and Services

Table 126. Alfa Chemistry (Private, USA) POI Substrate Production (Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 127. Alfa Chemistry (Private, USA) Recent Developments/Updates

Table 128. Alfa Chemistry (Private, USA) Competitive Strengths & Weaknesses

Table 129. Global Key Players of POI Substrate Upstream (Raw Materials)

Table 130. Global POI Substrate Typical Customers

Table 131. POI Substrate Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. POI Substrate Picture

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

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

Figure 4. World POI Substrate Production (2021-2032) & (Pcs)

Figure 5. World POI Substrate Average Price (2021-2032) & (US\$/Pcs)

Figure 6. World POI Substrate Production Value Market Share by Region (2021-2032)

Figure 7. World POI Substrate Production Market Share by Region (2021-2032)

Figure 8. Europe POI Substrate Production (2021-2032) & (Pcs)

Figure 9. China POI Substrate Production (2021-2032) & (Pcs)

Figure 10. Japan POI Substrate Production (2021-2032) & (Pcs)

Figure 11. POI Substrate Market Drivers

Figure 12. Factors Affecting Demand

Figure 13. World POI Substrate Consumption (2021-2032) & (Pcs)

Figure 14. World POI Substrate Consumption Market Share by Region (2021-2032)

Figure 15. United States POI Substrate Consumption (2021-2032) & (Pcs)

Figure 16. China POI Substrate Consumption (2021-2032) & (Pcs)

Figure 17. Europe POI Substrate Consumption (2021-2032) & (Pcs)

Figure 18. Japan POI Substrate Consumption (2021-2032) & (Pcs)

Figure 19. South Korea POI Substrate Consumption (2021-2032) & (Pcs)

Figure 20. ASEAN POI Substrate Consumption (2021-2032) & (Pcs)

Figure 21. India POI Substrate Consumption (2021-2032) & (Pcs)

Figure 22. Producer Shipments of POI Substrate by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 23. Global Four-firm Concentration Ratios (CR4) for POI Substrate Markets in 2025

Figure 24. Global Four-firm Concentration Ratios (CR8) for POI Substrate Markets in 2025

Figure 25. United States VS China: POI Substrate Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 26. United States VS China: POI Substrate Production Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: POI Substrate Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States Based Manufacturers POI Substrate Production Market Share

2025

Figure 29. China Based Manufacturers POI Substrate Production Market Share 2025

Figure 30. Rest of World Based Manufacturers POI Substrate Production Market Share 2025

Figure 31. World POI Substrate Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 32. World POI Substrate Production Value Market Share by Type in 2025

Figure 33. Lithium Niobate on Insulator (LNOI)

Figure 34. Lithium Tantalate on Insulator (LTOI)

Figure 35. World POI Substrate Production Market Share by Type (2021-2032)

Figure 36. World POI Substrate Production Value Market Share by Type (2021-2032)

Figure 37. World POI Substrate Average Price by Type (2021-2032) & (US\$/Pcs)

Figure 38. World POI Substrate Production Value by Size, (USD Million), 2021 & 2025 & 2032

Figure 39. World POI Substrate Production Value Market Share by Size in 2025

Figure 40. 4-inch

Figure 41. 6-inch

Figure 42. Others

Figure 43. World POI Substrate Production Market Share by Size (2021-2032)

Figure 44. World POI Substrate Production Value Market Share by Size (2021-2032)

Figure 45. World POI Substrate Average Price by Size (2021-2032) & (US\$/Pcs)

Figure 46. World POI Substrate Production Value by Piezo-layer Thickness, (USD Million), 2021 & 2025 & 2032

Figure 47. World POI Substrate Production Value Market Share by Piezo-layer Thickness in 2025

Figure 48. 100nm-900nm

Figure 49. 1?m~20?m

Figure 50. Others

Figure 51. World POI Substrate Production Market Share by Piezo-layer Thickness (2021-2032)

Figure 52. World POI Substrate Production Value Market Share by Piezo-layer Thickness (2021-2032)

Figure 53. World POI Substrate Average Price by Piezo-layer Thickness (2021-2032) & (US\$/Pcs)

Figure 54. World POI Substrate Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 55. World POI Substrate Production Value Market Share by Application in 2025

Figure 56. SAW Filters

Figure 57. Electro-Optic Modulators

Figure 58. Others

Figure 59. World POI Substrate Production Market Share by Application (2021-2032)

Figure 60. World POI Substrate Production Value Market Share by Application (2021-2032)

Figure 61. World POI Substrate Average Price by Application (2021-2032) & (US\$/Pcs)

Figure 62. POI Substrate Industry Chain

Figure 63. POI Substrate Procurement Model

Figure 64. POI Substrate Sales Model

Figure 65. POI Substrate Sales Channels, Direct Sales, and Distribution

Figure 66. Methodology

Figure 67. Research Process and Data Source

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