

# Global POI Substrate 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 POI Substrate market size was valued at US\$ 172 million in 2025 and is forecast to a readjusted size of US\$ 1169 million by 2032 with a CAGR of 30.8% during review period.

In 2025, global POI Substrate production reached approximately 41,560 Pcs, with an average global market price of around US\$4,017 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™ 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. In 2023, it built a new production line with an annual output of 100,000 thin film lithium niobate (TFLN/LNOI). In 2025, it planned to build a new production base, and after completion, the annual production capacity of LNOI will reach 500,000 pieces.

From a manufacturer perspective, the market is concentrated but evolving. Jinan Jingzheng Electronics (NANOLN), Soitec, Shanghai Novel Si Integration Technology, NGK Insulators, PAM Xiamen are the top five players in the global POI Substrate market, accounting for 92.43% revenue share of the global market.

By type, Lithium Niobate on Insulator (LNOI) remains the largest segment, accounting for 72.39% revenue share of the whole market. Application-wise, Electro-Optical represents the largest market share at 69.43% in 2025.

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

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

Global POI Substrate 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 POI Substrate 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 POI Substrate
- 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 POI Substrate 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**

POI Substrate 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-Optical

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 POI Substrate product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of POI Substrate, with price, sales quantity, revenue, and global market share of POI Substrate from 2021 to 2026.

Chapter 3, the POI Substrate competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the POI Substrate 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 POI Substrate 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 POI Substrate.

Chapter 14 and 15, to describe POI Substrate sales channel, distributors, customers, research findings and conclusion.

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