

Global Quantum Well Infrared Photodetector (QWIP) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Quantum Well Infrared Photodetector (QWIP) market size is expected to reach \$ 88.37 million by 2032, rising at a market growth of 9.5% CAGR during the forecast period (2026-2032).

Quantum Well Infrared Photodetector, or QWIP, is a cooled photon detection technology that uses intersubband transitions in quantum well structures to detect mid wave and long wave infrared radiation. Its commercial value does not lie in low cost mass adoption for consumer electronics, but in providing high uniformity, strong stability, customizable spectral response, and scalable focal plane array capability for high end thermal imaging, long range surveillance, specialty gas leak visualization, and professional infrared measurement. Based on the currently verifiable official product pages, IRnova has established a QWIP product family represented by Tor LW, Idun 1055, Embla 1055, and Fenrir LW Pol, covering general long wave imaging, optical gas imaging, and polarimetric detection. QmagiQ focuses on standard and custom QWIP focal plane arrays as its main commercial offering, supplying device level capability to system manufacturers and integrators. Teledyne, through its FLIR brand, integrates cooled QWIP technology into industry systems such as the G306, serving electric utilities, industrial facilities, and hazardous gas inspection scenarios. Overall, QWIP is a narrow but high barrier platform industry whose core competitiveness is concentrated in array design, spectral selection, cooler matching, readout and packaging coordination, and system level delivery from detector to finished equipment to vertical application.

The most fundamental characteristic of the QWIP industry is not a large number of participants, but a very small number of publicly visible commercial players, extremely high technical barriers, and a strongly specialized product path. Based on the current official website record, the core entities that can still demonstrate active QWIP products

and a verifiable commercial chain are mainly IRnova, QmagiQ, and FLIR under Teledyne. This means competition is not centered on standardized commodity devices, but on high uniformity, stability, customizable spectral response, cooler matching, readout and packaging coordination, and system level reliability in delivery. IRnova has already expanded QWIP into a platform covering general long wave imaging, gas imaging, and polarimetric applications. QmagiQ continues to provide standard and custom FPA capability at the device level. FLIR converts QWIP into field deployable industry systems. This shows that the value chain of QWIP is not a single point technology, but a high barrier chain extending from array capability to full system solutions, which is the fundamental reason why the sector remains strategically meaningful despite its small size.

The commercial space for QWIP does not depend on mass consumer electronics diffusion, but mainly on continued investment in high value professional scenarios. Official pages repeatedly point to high end long wave thermal imaging and long range detection, optical gas imaging for gases such as SF₆, NH₃, and C₂H₄, and polarimetric sensing for more complex target recognition. In gas detection in particular, both IRnova's Idun 1055 and FLIR's G306 directly tie market demand to leak visualization, safe stand off inspection, handheld and fixed platform deployment, and power and industrial use cases. This means customers are not merely buying a detector, but a complete capability package with higher efficiency, stronger safety value, and better compliance relevance. For that reason, QWIP is better suited to a high value, low volume, project driven, and application specific business model than to mass adoption driven by price competition. As digital inspection of industrial facilities, hazardous gas management, and advanced imaging applications deepen, this professionally driven market structure still has room to expand.

From the perspective of regional structure and future outlook, the core publicly verifiable production capability of QWIP is clearly concentrated in Europe and the United States, indicating that the industry is still led by a small number of companies with deep technological accumulation. IRnova continues to expand its QWIP portfolio in Sweden, QmagiQ maintains its QWIP FPA commercialization position in the United States, and Teledyne, after completing the FLIR acquisition, has integrated cooled QWIP system capability into a broader industrial and defense electro optical platform. This suggests that future growth is more likely to come from product extension and deeper application penetration by existing core players rather than from the rapid emergence of many new entrants. Based on the public official record, the most promising directions include higher specification long wave arrays, stronger gas detection capability, polarimetric imaging, and more complete system level delivery for vertical industries. In other words,

the future of QWIP is not that of a volume driven commodity device market, but of a high value professional market supported by continued upgrades in power inspection, industrial safety, environmental governance, and advanced detection demand.

This report studies the global Quantum Well Infrared Photodetector (QWIP) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Quantum Well Infrared Photodetector (QWIP) 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 Quantum Well Infrared Photodetector (QWIP) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Quantum Well Infrared Photodetector (QWIP) total production and demand, 2021-2032, (K Units)

Global Quantum Well Infrared Photodetector (QWIP) total production value, 2021-2032, (USD Million)

Global Quantum Well Infrared Photodetector (QWIP) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Quantum Well Infrared Photodetector (QWIP) consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Quantum Well Infrared Photodetector (QWIP) domestic production, consumption, key domestic manufacturers and share

Global Quantum Well Infrared Photodetector (QWIP) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Quantum Well Infrared Photodetector (QWIP) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Quantum Well Infrared Photodetector (QWIP) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Quantum Well Infrared Photodetector (QWIP) 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 IRnova AB, QmagiQ LLC, Teledyne Technologies Incorporated, 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 Quantum Well Infrared Photodetector (QWIP) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) 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 Quantum Well Infrared Photodetector (QWIP) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Quantum Well Infrared Photodetector (QWIP) Market, Segmentation by Type:

Light Guide Type

Photovoltaic Type

Global Quantum Well Infrared Photodetector (QWIP) Market, Segmentation by Product Level:

QWIP FPA Devices

QWIP End Systems

Global Quantum Well Infrared Photodetector (QWIP) Market, Segmentation by Target Spectral Band:

7.7-9.1 μ m LWIR

10.3-10.7 μ m OGI-Specific LWIR

Custom QWIP Bands

Global Quantum Well Infrared Photodetector (QWIP) Market, Segmentation by Application:

Military

Aerospace

Ship

Car

Other

Companies Profiled:

IRnova AB

QmagiQ LLC

Teledyne Technologies Incorporated

Key Questions Answered:

1. How big is the global Quantum Well Infrared Photodetector (QWIP) market?
2. What is the demand of the global Quantum Well Infrared Photodetector (QWIP) market?
3. What is the year over year growth of the global Quantum Well Infrared Photodetector (QWIP) market?
4. What is the production and production value of the global Quantum Well Infrared Photodetector (QWIP) market?
5. Who are the key producers in the global Quantum Well Infrared Photodetector (QWIP) market?
6. What are the growth factors driving the market demand?

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