

# Global Metal Lens Market Growth 2026-2032

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## Abstracts

The global Metal Lens market size is predicted to grow from US\$ 65.85 million in 2025 to US\$ 8087 million in 2032; it is expected to grow at a CAGR of 95.4% from 2026 to 2032.

In 2025, global metalens production reached approximately 1,565.19 K Pcs, with an average global market price of around US\$ 43 per Pcs.

Metal Lens (more commonly written 'Metalens') is a flat optical lens built from a metasurface, meaning a surface covered with subwavelength nanostructures that manipulate light. Instead of relying on the curved shape of glass or plastic like a conventional lens, a metalens controls the phase, amplitude, polarization, and sometimes wavelength response of incoming light through precisely engineered nanoscale features.

The metalens industry chain is fundamentally a semiconductorized optics value chain. Upstream, it depends on high-quality wafers, thin films, lithography / NIL tools, and foundational IP. Midstream, value is created through nanostructure design, wafer-scale fabrication, process control, and module assembly. Downstream, demand is currently strongest in consumer 3D sensing, biometrics, and compact imaging, with expansion potential in automotive, industrial, AR/VR, and biomedical imaging. The industry's key inflection point is whether companies can convert advanced metalens designs into high-yield, low-cost, wafer-level production and then embed them into complete sensing systems at scale.

### 1. Upstream: Raw Materials, Core Equipment, and Enabling Technologies

The upstream of the metalens industry mainly includes:

Substrate materials: silicon wafers, fused silica / SiO<sub>2</sub> wafers, and other optical substrates.

High-index optical materials for nanostructures: \*\*amorphous silicon (a-Si), silicon nitride (SiN), TiO<sub>2</sub> and related dielectric materials are commonly used in metalens fabrication routes. Nature's 2025 review describes deposition of a-Si on SiO<sub>2</sub> wafers and SiN on silicon wafers in representative fabrication flows.

Photoresists, imprint resins, hard-mask materials, and etch chemicals.

Master mold materials and replication consumables for nanoimprint-based high-volume manufacturing.

From an industry-chain perspective, the most critical raw-material requirement is not just 'optical material supply,' but high-uniformity, nanofabrication-compatible thin films and substrates that can support large-area, subwavelength pattern transfer with stable optical performance. The literature also highlights material selection as a commercialization bottleneck, especially where high refractive index, environmental robustness, and scalable processing must be balanced.

The equipment layer is highly semiconductor- and microfabrication-oriented, including:

Lithography systems: photolithography, e-beam lithography, immersion lithography

Nanoimprint lithography (NIL) equipment

Thin-film deposition tools: PECVD, sputtering, evaporation

Etching equipment: ICP / dry etch tools

Metrology and inspection systems

Wafer handling, bonding, and optical test equipment

A distinctive upstream feature of this market is that foundational IP and optical design libraries are unusually important. In practice, metalens commercialization depends not only on material and tool vendors, but also on:

Metasurface design algorithms

Phase profile / nanostructure libraries

Simulation software and process design kits

Patent portfolios and licensing rights

For example, Metalenz states it holds an exclusive worldwide license to foundational Harvard metasurface IP and has 150+ patents.

## 2. Midstream: Design, Fabrication, and Optical Module Manufacturing

The midstream begins with metalens design, where companies or research-to-commercialization players translate required optical functions into nanoscale patterns. This is a high-value part of the chain because metalenses compete on compactness, multifunctionality, aberration control, polarization control, and integration capability, not just on simple focusing. The manufacturing stage is where metalenses differ most from traditional optics. Instead of grinding and polishing curved lenses, metalenses are fabricated as subwavelength nanostructures on wafers through semiconductor-style processing.

This is the part of the chain where yield, CD control, uniformity, defect density, overlay accuracy, and pattern fidelity become decisive. EV Group's paper shows that the metalens supply chain for volume production can include designer ? design master ? pilot production ? wafer-level HVM, supported by precision mastering and NIL process transfer.

A notable commercialization pathway is the migration of optics production into semiconductor manufacturing platforms. This means the midstream is increasingly shaped by three commercialization models:

Fabless IP / design company + semiconductor manufacturing partner

Integrated device manufacturer (IDM) model

Process-platform / equipment ecosystem model centered on NIL and wafer optics

## 3. Downstream: Module Integration and Application Markets

Most metalenses are not sold as stand-alone consumer products. They are usually integrated downstream into:

3D sensing modules

time-of-flight modules

camera-assist systems

biometric sensing modules

LiDAR-related optical engines

AR/VR and wearable optical modules

This makes module houses, sensor manufacturers, and OEM integrators the key downstream buyers, rather than end users directly.

LP Information, Inc. (LPI) ' newest research report, the ?Metal Lens Industry Forecast? looks at past sales and reviews total world Metal Lens sales in 2025, providing a comprehensive analysis by region and market sector of projected Metal Lens sales for 2026 through 2032. With Metal Lens sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Metal Lens industry.

This Insight Report provides a comprehensive analysis of the global Metal Lens landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Metal Lens portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Metal Lens market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Metal Lens and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Metal Lens.

This report presents a comprehensive overview, market shares, and growth opportunities of Metal Lens market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Type:

Visible Lens

Infrared Lens

#### Segmentation by Product Quality:

Industrial Grade

Consumer Grade

#### Segmentation by Sales Method:

Direct Selling

Distribution

#### Segmentation by Application:

Consumer Electronics

Automotive Electronics

Industrial

Medical

Others

This report also splits the market by region:

### Americas

United States

Canada

Mexico

Brazil

### APAC

China

Japan

Korea

Southeast Asia

India

Australia

### Europe

Germany

France

UK

Italy

Russia

### Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Metalenz, Inc.

Radiant Opto-Electronics (NIL Technology)

MetaLenX

Hangzhou Najing Technology

SHPHOTONICS

Myrias Optics

### **Key Questions Addressed in this Report**

What is the 10-year outlook for the global Metal Lens market?

What factors are driving Metal Lens market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Metal Lens market opportunities vary by end market size?

How does Metal Lens break out by Type, by Application?

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