

Global Piezo-On-Insulator (POI) Market Growth 2026-2032

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Abstracts

The global Piezo-On-Insulator (POI) market size is predicted to grow from US\$ 262 million in 2025 to US\$ 2223 million in 2032; it is expected to grow at a CAGR of 38.3% from 2026 to 2032.

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[®] 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.

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

This Insight Report provides a comprehensive analysis of the global Piezo-On-Insulator (POI) 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 Piezo-On-Insulator (POI) portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Piezo-On-Insulator (POI) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Piezo-On-Insulator (POI) 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 Piezo-On-Insulator (POI).

This report presents a comprehensive overview, market shares, and growth

opportunities of Piezo-On-Insulator (POI) market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Lithium Niobate on Insulator (LNOI)

Lithium Tantalate on Insulator (LTOI)

Segmentation by Size:

4-inch

6-inch

Others

Segmentation by Piezo-layer Thickness:

100nm-900nm

1?m~20?m

Others

Segmentation by Application:

SAW Filters

Electro-Optic Modulators

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.

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 Addressed in this Report

What is the 10-year outlook for the global Piezo-On-Insulator (POI) market?

What factors are driving Piezo-On-Insulator (POI) market growth, globally and by region?

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

How do Piezo-On-Insulator (POI) market opportunities vary by end market size?

How does Piezo-On-Insulator (POI) break out by Type, by Application?

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