

Global POI Substrate Market Growth 2026-2032

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Abstracts

The global POI Substrate market size is predicted to grow from US\$ 262 million in 2025 to US\$ 2030 million in 2032; it is expected to grow at a CAGR of 36.2% from 2026 to 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[®] 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.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for POI Substrate 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 POI Substrate.

This report presents a comprehensive overview, market shares, and growth opportunities of POI Substrate 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 POI Substrate market?

What factors are driving POI Substrate market growth, globally and by region?

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

How do POI Substrate market opportunities vary by end market size?

How does POI Substrate break out by Type, by Application?

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