

Global Wafer Level Metalens Market Growth 2026-2032

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Abstracts

The global Wafer Level Metalens market size is predicted to grow from US\$ 36.20 million in 2025 to US\$ 1381 million in 2032; it is expected to grow at a CAGR of 68.4% from 2026 to 2032.

A Wafer Level Metalens is a planar meta-optical element or an array of meta-optical elements fabricated directly across a semiconductor, glass, fused-silica or other optical wafer using lithography, deposition, etching, nanoimprint replication or related wafer-scale processes. Its optical function is produced by subwavelength nanostructures that locally control the phase, amplitude, polarization or propagation direction of light, enabling focusing, imaging, collimation, beam shaping, diffraction or multifunctional wavefront control in an ultrathin structure. Wafer-level manufacturing allows hundreds or thousands of identical metalenses to be patterned, inspected and processed simultaneously before wafer dicing or module-level integration, supporting higher dimensional consistency and lower unit cost at commercial volumes. The product may be supplied as a complete patterned wafer, a metalens plate, a wafer-level metalens array or individual dies produced through wafer processing, and is mainly used in 3D sensing, consumer electronics, miniature cameras, automotive sensing, machine vision, AR/VR optics, optical communications and medical imaging.

Key Findings

2025 shipment volume reached approximately 3.36 million pieces

Average selling price reached US\$11.00 per piece in 2025

Industry gross margin averaged approximately 44% in 2025

Near-infrared products represented the largest commercial wavelength segment

North America remained the largest regional revenue market in 2025

Wafer fabrication and testing dominated total manufacturing costs

Market Trends

The Wafer Level Metalens industry is moving from research-oriented prototyping toward semiconductor-scale manufacturing, standardized testing and module-level integration. Suppliers are increasingly adopting 200 mm and 300 mm wafer platforms, high-aspect-ratio dielectric structures, direct nanoimprint replication and automated wafer-level characterization to improve consistency and reduce unit costs. Product development is expanding beyond single-function focusing lenses toward collimators, structured-light projectors, polarization-sensitive optics, wide-field imaging devices and multifunctional metasurfaces combining several optical functions on one surface. Near-infrared products remain the most commercially mature because their relatively narrow operating bands are compatible with ToF, facial authentication, proximity sensing, eye tracking and driver-monitoring systems. Visible-light metalenses are progressing through hybrid refractive-metalens architectures, computational correction and improved broadband efficiency, while mid-infrared products remain concentrated in specialized sensing and defense applications. The longer-term development direction is the co-design of metalens structures, image sensors, algorithms and wafer-level packaging rather than the simple replacement of an individual conventional lens. This transition increases system-level value while allowing component prices to decline as production yields and wafer utilization improve.

Market Dynamics

Drivers

Demand is primarily driven by the need to reduce the size, thickness, weight and component count of optical modules used in smartphones, smart access devices, wearables, robots, automotive sensing systems and compact industrial cameras. Metalenses can replace multiple refractive or diffractive components with a single patterned surface and can be manufactured using processes derived from semiconductor fabrication. This compatibility supports high-volume production, automated assembly and closer integration with image sensors, VCSELs and detector packages. The commercial deployment of metasurface optics in consumer sensing modules has also reduced customer concerns regarding scalability and has encouraged

evaluation in automotive, industrial and biometric applications.

Restraints

Market expansion remains constrained by the trade-offs among optical efficiency, numerical aperture, field of view, chromatic bandwidth, polarization response and fabrication tolerance. Designs optimized for one wavelength or incidence angle may not maintain comparable performance across broadband visible-light applications. High-aspect-ratio nanostructures also impose demanding requirements on lithography, etching, imprint fidelity and defect control. Customers in automotive, medical and industrial markets require extended qualification cycles, environmental reliability testing and stable long-term supply, while existing optical module platforms are designed around established refractive-lens supply chains. These factors increase development costs and delay the transition from technical samples to recurring volume orders.

Opportunities

The most immediate opportunities are concentrated in 850 nm and 940 nm collimation, structured-light projection, ToF receiving optics, facial authentication, eye tracking, occupancy sensing and automotive DMS and OMS systems. Further opportunities are developing in compact color cameras, AR and VR display optics, pico projectors, machine vision, LiDAR, chip-scale spectroscopy and polarization imaging. Visible-light hybrid systems offer a practical commercialization pathway because conventional elements can compensate for broadband aberrations while the metalens reduces module length and introduces functions that are difficult to achieve using traditional optics alone. Mid-infrared metalenses could create higher-value demand in gas detection, thermal sensing, medical diagnostics and defense once material, packaging and environmental-reliability barriers are reduced.

Challenges

The industry faces risks related to fragmented intellectual-property ownership, limited cross-platform design standards, wafer-yield variation and the absence of broadly accepted metalens performance and reliability benchmarks. Optical measurement at wafer level is more complex than conventional dimensional inspection because focusing efficiency, wavefront error, polarization response and field performance must be evaluated at production speed. Concentration of suitable fabrication capacity among a limited group of semiconductor and nanoimprint partners may create supply-chain and capacity risks. As consumer-electronics volumes increase, customers are also expected

to demand annual price reductions, placing pressure on suppliers that have not achieved stable yield, automated testing or sufficient wafer loading.

Industry Chain Analysis

The upstream industry comprises silicon and glass wafers, high-refractive-index dielectric materials, nanoparticle composites, photoresists, imprint materials, photomasks, master templates, lithography and etching equipment, deposition systems and optical metrology tools. Midstream participants undertake electromagnetic and optical design, mask or master development, wafer fabrication, nanoimprint replication, coating, wafer-level inspection, dicing, packaging and optical-module integration. Downstream customers include consumer-electronics OEMs, sensor and camera-module manufacturers, automotive Tier 1 suppliers, robotics companies, industrial-vision equipment manufacturers, medical-device companies and defense-system providers. Design intellectual property and application-specific optical engineering generate a significant share of value, while production profitability is determined by wafer utilization, patterning yield, metrology throughput and packaging yield. The indicative 2025 manufacturing cost structure was approximately 22% for substrates and functional materials, 32% for lithography, etching or nanoimprint processing, 15% for masks and master amortization, 21% for testing, dicing and packaging, and 10% for yield loss, quality control and manufacturing overhead. The industry's average gross margin was approximately 44%, with customized visible-light and multifunctional products generally exceeding the margin of standardized high-volume near-infrared devices.

Downstream Market Opportunities

Consumer electronics and 3D sensing represented more than half of 2025 demand, supported by facial authentication, proximity sensing, smart access, gesture recognition and compact depth-sensing modules. Automotive electronics is expected to become one of the fastest-expanding downstream markets as metalenses enter driver monitoring, occupant monitoring, LiDAR, intelligent lighting and compact camera systems. Industrial robotics and machine vision offer attractive medium-volume opportunities because customers value reduced system size, precise beam control and customized wavelength performance more than minimum component price. Medical instrumentation, chip-scale spectroscopy, AR and VR devices and polarization imaging provide additional high-margin opportunities, although commercialization will depend on application-specific qualification and closer integration among metalens, sensor, illumination and algorithm suppliers.

Regional Insights

North America was the largest regional revenue market in 2025, accounting for an estimated 35%–40% of global value, supported by strong intellectual-property ownership, early commercial deployment and the presence of Metalenz, Moxtek and Myrias Optics. The region's competitive advantage is concentrated in metalens design, proprietary materials, licensing and system-level sensing solutions, while volume fabrication is increasingly coordinated with semiconductor and nanoimprint partners in Europe and Asia.

Asia-Pacific represented approximately 30%–35% of market revenue and was the fastest-expanding region. China has developed a broad supplier base covering design, wafer fabrication, metalens components and integrated sensing modules, while Singapore and Taiwan are strengthening 12-inch glass-wafer production, optical-component manufacturing and electronics supply-chain integration. Europe retains important capabilities in nanoimprint manufacturing, metalens prototyping and semiconductor-scale production, particularly through NILT and associated manufacturing ecosystems. Regional competition is expected to shift gradually from laboratory performance toward production yield, qualification capability, delivery stability and direct access to consumer-electronics and automotive customers.

Report Scope

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Wafer Level Metalens 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 Wafer Level Metalens.

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

Segmentation by Type:

Visible-Band Metalens: 400 – 700 nm

Near-Infrared Metalens: 700 – 2500 nm

Mid-Infrared Metalens: >2500 nm

Segmentation by Optical Function:

Imaging and Focusing Metalens

Collimating Metalens

Other

Segmentation by Application:

3D Sensing

Structured Light Projection

Automotive LiDAR and Sensing

Consumer Electronics

Industrial Machine Vision

Optical Communications

Other

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.

Metallenz, Inc.

Radiant Opto-Electronics (NIL Technology)

MetaLenX

Hangzhou Najing Technology

SHPHOTONICS

Alpha Cen

Myrias Optics

NDNANO

Moxtek, Inc.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Wafer Level Metalens market?

What factors are driving Wafer Level Metalens market growth, globally and by region?

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

How do Wafer Level Metalens market opportunities vary by end market size?

How does Wafer Level Metalens break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Wafer Level Metalens Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Wafer Level Metalens by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Wafer Level Metalens by Country/Region, 2021, 2025 & 2032

2.2 Wafer Level Metalens Segment by Type

- 2.2.1 Visible-Band Metalens: 400 – 700 nm
- 2.2.2 Near-Infrared Metalens: 700 – 2500 nm
- 2.2.3 Mid-Infrared Metalens: >2500 nm
- 2.2.4 Wafer Level Metalens Sales by Type
 - 2.2.4.1 Global Wafer Level Metalens Sales Market Share by Type (2021-2026)
 - 2.2.4.2 Global Wafer Level Metalens Revenue and Market Share by Type (2021-2026)
 - 2.2.4.3 Global Wafer Level Metalens Sale Price by Type (2021-2026)

2.3 Wafer Level Metalens Segment by Optical Function

- 2.3.1 Imaging and Focusing Metalens
- 2.3.2 Collimating Metalens
- 2.3.3 Other
- 2.3.4 Wafer Level Metalens Sales by Optical Function
 - 2.3.4.1 Global Wafer Level Metalens Sales Market Share by Optical Function (2021-2026)
 - 2.3.4.2 Global Wafer Level Metalens Revenue and Market Share by Optical Function (2021-2026)

- 2.3.4.3 Global Wafer Level Metalens Sale Price by Optical Function (2021-2026)
- 2.4 Wafer Level Metalens Segment by Application
 - 2.4.1 3D Sensing
 - 2.4.2 Structured Light Projection
 - 2.4.3 Automotive LiDAR and Sensing
 - 2.4.4 Consumer Electronics
 - 2.4.5 Industrial Machine Vision
 - 2.4.6 Optical Communications
 - 2.4.7 Other
 - 2.4.8 Wafer Level Metalens Sales by Application
 - 2.4.8.1 Global Wafer Level Metalens Sale Market Share by Application (2021-2026)
 - 2.4.8.2 Global Wafer Level Metalens Revenue and Market Share by Application (2021-2026)
 - 2.4.8.3 Global Wafer Level Metalens Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

- 3.1 Global Wafer Level Metalens Breakdown Data by Company
 - 3.1.1 Global Wafer Level Metalens Annual Sales by Company (2021-2026)
 - 3.1.2 Global Wafer Level Metalens Sales Market Share by Company (2021-2026)
- 3.2 Global Wafer Level Metalens Annual Revenue by Company (2021-2026)
 - 3.2.1 Global Wafer Level Metalens Revenue by Company (2021-2026)
 - 3.2.2 Global Wafer Level Metalens Revenue Market Share by Company (2021-2026)
- 3.3 Global Wafer Level Metalens Sale Price by Company
- 3.4 Key Manufacturers Wafer Level Metalens Producing Area Distribution, Sales Area, Product Type
 - 3.4.1 Key Manufacturers Wafer Level Metalens Product Location Distribution
 - 3.4.2 Players Wafer Level Metalens Products Offered
- 3.5 Market Concentration Rate Analysis
 - 3.5.1 Competition Landscape Analysis
 - 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR WAFER LEVEL METALENS BY GEOGRAPHIC REGION

- 4.1 World Historic Wafer Level Metalens Market Size by Geographic Region (2021-2026)

- 4.1.1 Global Wafer Level Metalens Annual Sales by Geographic Region (2021-2026)
- 4.1.2 Global Wafer Level Metalens Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Wafer Level Metalens Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Wafer Level Metalens Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Wafer Level Metalens Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Wafer Level Metalens Sales Growth
- 4.4 APAC Wafer Level Metalens Sales Growth
- 4.5 Europe Wafer Level Metalens Sales Growth
- 4.6 Middle East & Africa Wafer Level Metalens Sales Growth

5 AMERICAS

- 5.1 Americas Wafer Level Metalens Sales by Country
 - 5.1.1 Americas Wafer Level Metalens Sales by Country (2021-2026)
 - 5.1.2 Americas Wafer Level Metalens Revenue by Country (2021-2026)
- 5.2 Americas Wafer Level Metalens Sales by Type (2021-2026)
- 5.3 Americas Wafer Level Metalens Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

- 6.1 APAC Wafer Level Metalens Sales by Region
 - 6.1.1 APAC Wafer Level Metalens Sales by Region (2021-2026)
 - 6.1.2 APAC Wafer Level Metalens Revenue by Region (2021-2026)
- 6.2 APAC Wafer Level Metalens Sales by Type (2021-2026)
- 6.3 APAC Wafer Level Metalens Sales by Application (2021-2026)
- 6.4 China
- 6.5 Japan
- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

7 EUROPE

7.1 Europe Wafer Level Metalens by Country

7.1.1 Europe Wafer Level Metalens Sales by Country (2021-2026)

7.1.2 Europe Wafer Level Metalens Revenue by Country (2021-2026)

7.2 Europe Wafer Level Metalens Sales by Type (2021-2026)

7.3 Europe Wafer Level Metalens Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Wafer Level Metalens by Country

8.1.1 Middle East & Africa Wafer Level Metalens Sales by Country (2021-2026)

8.1.2 Middle East & Africa Wafer Level Metalens Revenue by Country (2021-2026)

8.2 Middle East & Africa Wafer Level Metalens Sales by Type (2021-2026)

8.3 Middle East & Africa Wafer Level Metalens Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Wafer Level Metalens

10.3 Manufacturing Process Analysis of Wafer Level Metalens

10.4 Industry Chain Structure of Wafer Level Metalens

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Wafer Level Metalens Distributors

11.3 Wafer Level Metalens Customer

12 WORLD FORECAST REVIEW FOR WAFER LEVEL METALENS BY GEOGRAPHIC REGION

12.1 Global Wafer Level Metalens Market Size Forecast by Region

12.1.1 Global Wafer Level Metalens Forecast by Region (2027-2032)

12.1.2 Global Wafer Level Metalens Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Wafer Level Metalens Forecast by Type (2027-2032)

12.7 Global Wafer Level Metalens Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Metalenz, Inc.

13.1.1 Metalenz, Inc. Company Information

13.1.2 Metalenz, Inc. Wafer Level Metalens Product Portfolios and Specifications

13.1.3 Metalenz, Inc. Wafer Level Metalens Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Metalenz, Inc. Main Business Overview

13.1.5 Metalenz, Inc. Latest Developments

13.2 Radiant Opto-Electronics (NIL Technology)

13.2.1 Radiant Opto-Electronics (NIL Technology) Company Information

13.2.2 Radiant Opto-Electronics (NIL Technology) Wafer Level Metalens Product Portfolios and Specifications

13.2.3 Radiant Opto-Electronics (NIL Technology) Wafer Level Metalens Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Radiant Opto-Electronics (NIL Technology) Main Business Overview

13.2.5 Radiant Opto-Electronics (NIL Technology) Latest Developments

13.3 MetaLenX

13.3.1 MetaLenX Company Information

- 13.3.2 MetaLenX Wafer Level Metalens Product Portfolios and Specifications
- 13.3.3 MetaLenX Wafer Level Metalens Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.3.4 MetaLenX Main Business Overview
- 13.3.5 MetaLenX Latest Developments
- 13.4 Hangzhou Najing Technology
 - 13.4.1 Hangzhou Najing Technology Company Information
 - 13.4.2 Hangzhou Najing Technology Wafer Level Metalens Product Portfolios and Specifications
 - 13.4.3 Hangzhou Najing Technology Wafer Level Metalens Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 Hangzhou Najing Technology Main Business Overview
 - 13.4.5 Hangzhou Najing Technology Latest Developments
- 13.5 SHPHOTONICS
 - 13.5.1 SHPHOTONICS Company Information
 - 13.5.2 SHPHOTONICS Wafer Level Metalens Product Portfolios and Specifications
 - 13.5.3 SHPHOTONICS Wafer Level Metalens Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 SHPHOTONICS Main Business Overview
 - 13.5.5 SHPHOTONICS Latest Developments
- 13.6 Alpha Cen
 - 13.6.1 Alpha Cen Company Information
 - 13.6.2 Alpha Cen Wafer Level Metalens Product Portfolios and Specifications
 - 13.6.3 Alpha Cen Wafer Level Metalens Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 Alpha Cen Main Business Overview
 - 13.6.5 Alpha Cen Latest Developments
- 13.7 Myrias Optics
 - 13.7.1 Myrias Optics Company Information
 - 13.7.2 Myrias Optics Wafer Level Metalens Product Portfolios and Specifications
 - 13.7.3 Myrias Optics Wafer Level Metalens Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 Myrias Optics Main Business Overview
 - 13.7.5 Myrias Optics Latest Developments
- 13.8 NDNANO
 - 13.8.1 NDNANO Company Information
 - 13.8.2 NDNANO Wafer Level Metalens Product Portfolios and Specifications
 - 13.8.3 NDNANO Wafer Level Metalens Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 NDNANO Main Business Overview

13.8.5 NDNANO Latest Developments

13.9 Moxtek, Inc.

13.9.1 Moxtek, Inc. Company Information

13.9.2 Moxtek, Inc. Wafer Level Metalens Product Portfolios and Specifications

13.9.3 Moxtek, Inc. Wafer Level Metalens Sales, Revenue, Price and Gross Margin
(2021-2026)

13.9.4 Moxtek, Inc. Main Business Overview

13.9.5 Moxtek, Inc. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Wafer Level Metalens Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Wafer Level Metalens Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Visible-Band Metalens: 400 – 700 nm

Table 4. Major Players of Near-Infrared Metalens: 700 – 2500 nm

Table 5. Major Players of Mid-Infrared Metalens: >2500 nm

Table 6. Global Wafer Level Metalens Sales by Type (2021-2026) & (K Pcs)

Table 7. Global Wafer Level Metalens Sales Market Share by Type (2021-2026)

Table 8. Global Wafer Level Metalens Revenue by Type (2021-2026) & (\$ million)

Table 9. Global Wafer Level Metalens Revenue Market Share by Type (2021-2026)

Table 10. Global Wafer Level Metalens Sale Price by Type (2021-2026) & (US\$/Pc)

Table 11. Major Players of Imaging and Focusing Metalens

Table 12. Major Players of Collimating Metalens

Table 13. Major Players of Other

Table 14. Global Wafer Level Metalens Sales by Optical Function (2021-2026) & (K Pcs)

Table 15. Global Wafer Level Metalens Sales Market Share by Optical Function (2021-2026)

Table 16. Global Wafer Level Metalens Revenue by Optical Function (2021-2026) & (\$ million)

Table 17. Global Wafer Level Metalens Revenue Market Share by Optical Function (2021-2026)

Table 18. Global Wafer Level Metalens Sale Price by Optical Function (2021-2026) & (US\$/Pc)

Table 19. Global Wafer Level Metalens Sale by Application (2021-2026) & (K Pcs)

Table 20. Global Wafer Level Metalens Sale Market Share by Application (2021-2026)

Table 21. Global Wafer Level Metalens Revenue by Application (2021-2026) & (\$ million)

Table 22. Global Wafer Level Metalens Revenue Market Share by Application (2021-2026)

Table 23. Global Wafer Level Metalens Sale Price by Application (2021-2026) & (US\$/Pc)

Table 24. Global Wafer Level Metalens Sales by Company (2021-2026) & (K Pcs)

Table 25. Global Wafer Level Metalens Sales Market Share by Company (2021-2026)

Table 26. Global Wafer Level Metalens Revenue by Company (2021-2026) & (\$ millions)

Table 27. Global Wafer Level Metalens Revenue Market Share by Company (2021-2026)

Table 28. Global Wafer Level Metalens Sale Price by Company (2021-2026) & (US\$/Pc)

Table 29. Key Manufacturers Wafer Level Metalens Producing Area Distribution and Sales Area

Table 30. Players Wafer Level Metalens Products Offered

Table 31. Wafer Level Metalens Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 32. New Products and Potential Entrants

Table 33. Market M&A Activity & Strategy

Table 34. Global Wafer Level Metalens Sales by Geographic Region (2021-2026) & (K Pcs)

Table 35. Global Wafer Level Metalens Sales Market Share Geographic Region (2021-2026)

Table 36. Global Wafer Level Metalens Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 37. Global Wafer Level Metalens Revenue Market Share by Geographic Region (2021-2026)

Table 38. Global Wafer Level Metalens Sales by Country/Region (2021-2026) & (K Pcs)

Table 39. Global Wafer Level Metalens Sales Market Share by Country/Region (2021-2026)

Table 40. Global Wafer Level Metalens Revenue by Country/Region (2021-2026) & (\$ millions)

Table 41. Global Wafer Level Metalens Revenue Market Share by Country/Region (2021-2026)

Table 42. Americas Wafer Level Metalens Sales by Country (2021-2026) & (K Pcs)

Table 43. Americas Wafer Level Metalens Sales Market Share by Country (2021-2026)

Table 44. Americas Wafer Level Metalens Revenue by Country (2021-2026) & (\$ millions)

Table 45. Americas Wafer Level Metalens Sales by Type (2021-2026) & (K Pcs)

Table 46. Americas Wafer Level Metalens Sales by Application (2021-2026) & (K Pcs)

Table 47. APAC Wafer Level Metalens Sales by Region (2021-2026) & (K Pcs)

Table 48. APAC Wafer Level Metalens Sales Market Share by Region (2021-2026)

Table 49. APAC Wafer Level Metalens Revenue by Region (2021-2026) & (\$ millions)

Table 50. APAC Wafer Level Metalens Sales by Type (2021-2026) & (K Pcs)

Table 51. APAC Wafer Level Metalens Sales by Application (2021-2026) & (K Pcs)

Table 52. Europe Wafer Level Metalens Sales by Country (2021-2026) & (K Pcs)
Table 53. Europe Wafer Level Metalens Revenue by Country (2021-2026) & (\$ millions)
Table 54. Europe Wafer Level Metalens Sales by Type (2021-2026) & (K Pcs)
Table 55. Europe Wafer Level Metalens Sales by Application (2021-2026) & (K Pcs)
Table 56. Middle East & Africa Wafer Level Metalens Sales by Country (2021-2026) & (K Pcs)
Table 57. Middle East & Africa Wafer Level Metalens Revenue Market Share by Country (2021-2026)
Table 58. Middle East & Africa Wafer Level Metalens Sales by Type (2021-2026) & (K Pcs)
Table 59. Middle East & Africa Wafer Level Metalens Sales by Application (2021-2026) & (K Pcs)
Table 60. Key Market Drivers & Growth Opportunities of Wafer Level Metalens
Table 61. Key Market Challenges & Risks of Wafer Level Metalens
Table 62. Key Industry Trends of Wafer Level Metalens
Table 63. Wafer Level Metalens Raw Material
Table 64. Key Suppliers of Raw Materials
Table 65. Wafer Level Metalens Distributors List
Table 66. Wafer Level Metalens Customer List
Table 67. Global Wafer Level Metalens Sales Forecast by Region (2027-2032) & (K Pcs)
Table 68. Global Wafer Level Metalens Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 69. Americas Wafer Level Metalens Sales Forecast by Country (2027-2032) & (K Pcs)
Table 70. Americas Wafer Level Metalens Annual Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 71. APAC Wafer Level Metalens Sales Forecast by Region (2027-2032) & (K Pcs)
Table 72. APAC Wafer Level Metalens Annual Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 73. Europe Wafer Level Metalens Sales Forecast by Country (2027-2032) & (K Pcs)
Table 74. Europe Wafer Level Metalens Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 75. Middle East & Africa Wafer Level Metalens Sales Forecast by Country (2027-2032) & (K Pcs)
Table 76. Middle East & Africa Wafer Level Metalens Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 77. Global Wafer Level Metalens Sales Forecast by Type (2027-2032) & (K Pcs)
Table 78. Global Wafer Level Metalens Revenue Forecast by Type (2027-2032) & (\$ millions)
Table 79. Global Wafer Level Metalens Sales Forecast by Application (2027-2032) & (K Pcs)
Table 80. Global Wafer Level Metalens Revenue Forecast by Application (2027-2032) & (\$ millions)
Table 81. Metalenz, Inc. Basic Information, Wafer Level Metalens Manufacturing Base, Sales Area and Its Competitors
Table 82. Metalenz, Inc. Wafer Level Metalens Product Portfolios and Specifications
Table 83. Metalenz, Inc. Wafer Level Metalens Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)
Table 84. Metalenz, Inc. Main Business
Table 85. Metalenz, Inc. Latest Developments
Table 86. Radiant Opto-Electronics (NIL Technology) Basic Information, Wafer Level Metalens Manufacturing Base, Sales Area and Its Competitors
Table 87. Radiant Opto-Electronics (NIL Technology) Wafer Level Metalens Product Portfolios and Specifications
Table 88. Radiant Opto-Electronics (NIL Technology) Wafer Level Metalens Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)
Table 89. Radiant Opto-Electronics (NIL Technology) Main Business
Table 90. Radiant Opto-Electronics (NIL Technology) Latest Developments
Table 91. MetaLenX Basic Information, Wafer Level Metalens Manufacturing Base, Sales Area and Its Competitors
Table 92. MetaLenX Wafer Level Metalens Product Portfolios and Specifications
Table 93. MetaLenX Wafer Level Metalens Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)
Table 94. MetaLenX Main Business
Table 95. MetaLenX Latest Developments
Table 96. Hangzhou Najing Technology Basic Information, Wafer Level Metalens Manufacturing Base, Sales Area and Its Competitors
Table 97. Hangzhou Najing Technology Wafer Level Metalens Product Portfolios and Specifications
Table 98. Hangzhou Najing Technology Wafer Level Metalens Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)
Table 99. Hangzhou Najing Technology Main Business
Table 100. Hangzhou Najing Technology Latest Developments
Table 101. SHPHOTONICS Basic Information, Wafer Level Metalens Manufacturing Base, Sales Area and Its Competitors

Table 102. SHPHOTONICS Wafer Level Metalens Product Portfolios and Specifications

Table 103. SHPHOTONICS Wafer Level Metalens Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 104. SHPHOTONICS Main Business

Table 105. SHPHOTONICS Latest Developments

Table 106. Alpha Cen Basic Information, Wafer Level Metalens Manufacturing Base, Sales Area and Its Competitors

Table 107. Alpha Cen Wafer Level Metalens Product Portfolios and Specifications

Table 108. Alpha Cen Wafer Level Metalens Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 109. Alpha Cen Main Business

Table 110. Alpha Cen Latest Developments

Table 111. Myrias Optics Basic Information, Wafer Level Metalens Manufacturing Base, Sales Area and Its Competitors

Table 112. Myrias Optics Wafer Level Metalens Product Portfolios and Specifications

Table 113. Myrias Optics Wafer Level Metalens Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 114. Myrias Optics Main Business

Table 115. Myrias Optics Latest Developments

Table 116. NDNANO Basic Information, Wafer Level Metalens Manufacturing Base, Sales Area and Its Competitors

Table 117. NDNANO Wafer Level Metalens Product Portfolios and Specifications

Table 118. NDNANO Wafer Level Metalens Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 119. NDNANO Main Business

Table 120. NDNANO Latest Developments

Table 121. Moxtek, Inc. Basic Information, Wafer Level Metalens Manufacturing Base, Sales Area and Its Competitors

Table 122. Moxtek, Inc. Wafer Level Metalens Product Portfolios and Specifications

Table 123. Moxtek, Inc. Wafer Level Metalens Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 124. Moxtek, Inc. Main Business

Table 125. Moxtek, Inc. Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Wafer Level Metalens
- Figure 2. Wafer Level Metalens Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Wafer Level Metalens Sales Growth Rate 2021-2032 (K Pcs)
- Figure 7. Global Wafer Level Metalens Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Wafer Level Metalens Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Wafer Level Metalens Sales Market Share by Country/Region (2025)
- Figure 10. Wafer Level Metalens Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Visible-Band Metalens: 400 – 700 nm
- Figure 12. Product Picture of Near-Infrared Metalens: 700 – 2500 nm
- Figure 13. Product Picture of Mid-Infrared Metalens: >2500 nm
- Figure 14. Global Wafer Level Metalens Sales Market Share by Type in 2026
- Figure 15. Global Wafer Level Metalens Revenue Market Share by Type (2021-2026)
- Figure 16. Product Picture of Imaging and Focusing Metalens
- Figure 17. Product Picture of Collimating Metalens
- Figure 18. Product Picture of Other
- Figure 19. Global Wafer Level Metalens Sales Market Share by Optical Function in 2026
- Figure 20. Global Wafer Level Metalens Revenue Market Share by Optical Function (2021-2026)
- Figure 21. Wafer Level Metalens Consumed in 3D Sensing
- Figure 22. Global Wafer Level Metalens Market: 3D Sensing (2021-2026) & (K Pcs)
- Figure 23. Wafer Level Metalens Consumed in Structured Light Projection
- Figure 24. Global Wafer Level Metalens Market: Structured Light Projection (2021-2026) & (K Pcs)
- Figure 25. Wafer Level Metalens Consumed in Automotive LiDAR and Sensing
- Figure 26. Global Wafer Level Metalens Market: Automotive LiDAR and Sensing (2021-2026) & (K Pcs)
- Figure 27. Wafer Level Metalens Consumed in Consumer Electronics
- Figure 28. Global Wafer Level Metalens Market: Consumer Electronics (2021-2026) & (K Pcs)

- Figure 29. Wafer Level Metalens Consumed in Industrial Machine Vision
- Figure 30. Global Wafer Level Metalens Market: Industrial Machine Vision (2021-2026) & (K Pcs)
- Figure 31. Wafer Level Metalens Consumed in Optical Communications
- Figure 32. Global Wafer Level Metalens Market: Optical Communications (2021-2026) & (K Pcs)
- Figure 33. Wafer Level Metalens Consumed in Other
- Figure 34. Global Wafer Level Metalens Market: Other (2021-2026) & (K Pcs)
- Figure 35. Global Wafer Level Metalens Sale Market Share by Application (2025)
- Figure 36. Global Wafer Level Metalens Revenue Market Share by Application in 2025
- Figure 37. Wafer Level Metalens Sales by Company in 2025 (K Pcs)
- Figure 38. Global Wafer Level Metalens Sales Market Share by Company in 2025
- Figure 39. Wafer Level Metalens Revenue by Company in 2025 (\$ millions)
- Figure 40. Global Wafer Level Metalens Revenue Market Share by Company in 2025
- Figure 41. Global Wafer Level Metalens Sales Market Share by Geographic Region (2021-2026)
- Figure 42. Global Wafer Level Metalens Revenue Market Share by Geographic Region in 2025
- Figure 43. Americas Wafer Level Metalens Sales 2021-2026 (K Pcs)
- Figure 44. Americas Wafer Level Metalens Revenue 2021-2026 (\$ millions)
- Figure 45. APAC Wafer Level Metalens Sales 2021-2026 (K Pcs)
- Figure 46. APAC Wafer Level Metalens Revenue 2021-2026 (\$ millions)
- Figure 47. Europe Wafer Level Metalens Sales 2021-2026 (K Pcs)
- Figure 48. Europe Wafer Level Metalens Revenue 2021-2026 (\$ millions)
- Figure 49. Middle East & Africa Wafer Level Metalens Sales 2021-2026 (K Pcs)
- Figure 50. Middle East & Africa Wafer Level Metalens Revenue 2021-2026 (\$ millions)
- Figure 51. Americas Wafer Level Metalens Sales Market Share by Country in 2025
- Figure 52. Americas Wafer Level Metalens Revenue Market Share by Country (2021-2026)
- Figure 53. Americas Wafer Level Metalens Sales Market Share by Type (2021-2026)
- Figure 54. Americas Wafer Level Metalens Sales Market Share by Application (2021-2026)
- Figure 55. United States Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)
- Figure 56. Canada Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)
- Figure 57. Mexico Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)
- Figure 58. Brazil Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)
- Figure 59. APAC Wafer Level Metalens Sales Market Share by Region in 2025
- Figure 60. APAC Wafer Level Metalens Revenue Market Share by Region (2021-2026)
- Figure 61. APAC Wafer Level Metalens Sales Market Share by Type (2021-2026)

Figure 62. APAC Wafer Level Metalens Sales Market Share by Application (2021-2026)

Figure 63. China Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)

Figure 64. Japan Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)

Figure 65. South Korea Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)

Figure 66. Southeast Asia Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)

Figure 67. India Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)

Figure 68. Australia Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)

Figure 69. China Taiwan Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)

Figure 70. Europe Wafer Level Metalens Sales Market Share by Country in 2025

Figure 71. Europe Wafer Level Metalens Revenue Market Share by Country (2021-2026)

Figure 72. Europe Wafer Level Metalens Sales Market Share by Type (2021-2026)

Figure 73. Europe Wafer Level Metalens Sales Market Share by Application (2021-2026)

Figure 74. Germany Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)

Figure 75. France Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)

Figure 76. UK Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)

Figure 77. Italy Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)

Figure 78. Russia Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)

Figure 79. Middle East & Africa Wafer Level Metalens Sales Market Share by Country (2021-2026)

Figure 80. Middle East & Africa Wafer Level Metalens Sales Market Share by Type (2021-2026)

Figure 81. Middle East & Africa Wafer Level Metalens Sales Market Share by Application (2021-2026)

Figure 82. Egypt Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)

Figure 83. South Africa Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)

Figure 84. Israel Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)

Figure 85. Turkey Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)

Figure 86. GCC Countries Wafer Level Metalens Revenue Growth 2021-2026 (\$ millions)

Figure 87. Manufacturing Cost Structure Analysis of Wafer Level Metalens in 2026

Figure 88. Manufacturing Process Analysis of Wafer Level Metalens

Figure 89. Industry Chain Structure of Wafer Level Metalens

Figure 90. Channels of Distribution

Figure 91. Global Wafer Level Metalens Sales Market Forecast by Region (2027-2032)

Figure 92. Global Wafer Level Metalens Revenue Market Share Forecast by Region (2027-2032)

Figure 93. Global Wafer Level Metalens Sales Market Share Forecast by Type
(2027-2032)

Figure 94. Global Wafer Level Metalens Revenue Market Share Forecast by Type
(2027-2032)

Figure 95. Global Wafer Level Metalens Sales Market Share Forecast by Application
(2027-2032)

Figure 96. Global Wafer Level Metalens Revenue Market Share Forecast by Application
(2027-2032)

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