

Global Free-standing GaN Substrate Wafer Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Free-standing GaN Substrate Wafer competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Free-standing GaN Substrate Wafer is an independent gallium nitride (GaN) single crystal substrate prepared by homoepitaxial growth technology, without relying on heterogeneous substrates such as sapphire and silicon carbide for support. Its core features are low defect density, high thermal conductivity, and high breakdown voltage, and it is suitable for high-performance optoelectronics (LED/LD), power electronics, high-frequency electronics and other fields. Free-standing Gallium Nitride (GaN) substrate wafers have emerged as a foundational material in the development of next-generation electronic and optoelectronic devices, offering significant advantages over conventional substrates such as sapphire, silicon carbide (SiC), and silicon. These substrates are composed entirely of GaN crystal, eliminating the mismatch in lattice constant and thermal expansion coefficient typically seen in heteroepitaxial growth on foreign substrates. This congruence dramatically reduces defect densities, particularly threading dislocations, which are critical for achieving high-performance and long-reliability GaN-based devices. The demand for free-standing GaN substrates is being driven primarily by their crucial role in high-power and high-frequency applications such as RF power amplifiers, high electron mobility transistors (HEMTs), power converters, and laser diodes, where superior thermal management and electrical performance are required. By application, 2-inch wafers currently dominate the market due to their higher production maturity and lower cost, which occupied for a share nearly 84.13% in 2024. 4-inch wafers are gradually entering commercial use, particularly in high-power and high-frequency electronics, though their yield and cost performance still require optimization. Meanwhile, 6-inch free-standing GaN substrates are under active development by

leading global and Chinese companies, with the goal of scaling up for next-generation power electronics and photonic applications. Once technical challenges such as defect density and scalability are overcome, these larger substrates are expected to unlock economies of scale and enable more efficient GaN device manufacturing. In terms of application, free-standing GaN substrates are primarily used in optoelectronics (including blue/violet/green laser diodes and LEDs), high-frequency RF electronics (such as base station components and satellite communications), and power electronics (such as electric vehicle inverters and industrial power supplies). Among these, optoelectronic applications currently account for 70.06% in 2024 due to their stringent requirements for low dislocation density and high optical performance? areas where free-standing GaN substrates offer significant advantages over hetero-epitaxial solutions. In particular, the market for GaN-based laser diodes used in projection, AR/VR, and medical diagnostics continues to expand rapidly. As GaN power devices further penetrate the EV, renewable energy, and consumer electronics sectors, demand for large-diameter and high-quality free-standing GaN substrates is projected to rise, pushing the industry toward commercialization of 4-inch and 6-inch wafers. Manufacturing free-standing GaN wafers, however, presents technical and cost challenges. Current production methods include hydride vapor phase epitaxy (HVPE), ammonothermal growth, and Na-flux methods. Among these, HVPE remains the most commercially mature and widely adopted due to its high growth rate and scalability. Leading global manufacturers such as Sumitomo Electric, SCIOCS, Mitsubishi Chemical, and newer Chinese entrants like Suzhou Nanowin and Eta Research Ltd. are actively investing in expanding their capacities. In terms of revenue, the global three largest companies occupied for a share nearly 78.84% in 2024.

The global Free-standing GaN Substrate Wafer market size was estimated at USD 169.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 13.00% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Free-standing GaN Substrate Wafer market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Free-standing GaN Substrate Wafer market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Free-standing GaN Substrate Wafer market.

Global Free-standing GaN Substrate Wafer Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

Sumitomo Chemical (SCIOCS)
Mitsubishi Chemical
Sumitomo Electric Industries
Suzhou Nanowin Science and Technology
Eta Research Ltd.
Sino Nitride Semiconductor Technology
PAM XIAMEN
Kyma Technologies
Goetsu Semiconductor
Homray Material Technology (HMT)

Market Segmentation (by Type)

2 Inch
4 Inch and Above

Market Segmentation (by Application)

Optoelectronics
Power Electronics
High-Frequency Electronics

Geographic Segmentation

North America (USA, Canada, Mexico)
Europe (Germany, UK, France, Russia, Italy, Rest of Europe)
Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)
South America (Brazil, Argentina, Columbia, Rest of South America)
The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study
Neutral perspective on the market performance
Recent industry trends and developments
Competitive landscape & strategies of key players
Potential & niche segments and regions exhibiting promising growth covered
Historical, current, and projected market size, in terms of value
In-depth analysis of the Free-standing GaN Substrate Wafer Market
Overview of the regional outlook of the Free-standing GaN Substrate Wafer Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division

standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Free-standing GaN Substrate Wafer Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Free-standing GaN Substrate Wafer, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change
This enables you to anticipate market changes to remain ahead of your competitors
You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Contents

1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE

1.1 Market Definition and Statistical Scope of Free-standing GaN Substrate Wafer

1.2 Key Market Segments

1.2.1 Free-standing GaN Substrate Wafer Segment by Type

1.2.2 Free-standing GaN Substrate Wafer Segment by Application

1.3 Methodology & Sources of Information

1.3.1 Research Methodology

1.3.2 Research Process

1.3.3 Market Breakdown and Data Triangulation

1.3.4 Base Year

1.3.5 Report Assumptions & Caveats

2 FREE-STANDING GAN SUBSTRATE WAFER MARKET OVERVIEW

2.1 Global Market Overview

2.1.1 Global Free-standing GaN Substrate Wafer Market Size (M USD) Estimates and Forecasts (2020-2035)

2.1.2 Global Free-standing GaN Substrate Wafer Sales Estimates and Forecasts (2020-2035)

2.2 Market Segment Executive Summary

2.3 Global Market Size by Region

3 FREE-STANDING GAN SUBSTRATE WAFER MARKET COMPETITIVE LANDSCAPE

3.1 Company Assessment Quadrant

3.2 Global Free-standing GaN Substrate Wafer Product Life Cycle

3.3 Global Free-standing GaN Substrate Wafer Sales by Manufacturers (2020-2025)

3.4 Global Free-standing GaN Substrate Wafer Revenue Market Share by Manufacturers (2020-2025)

3.5 Free-standing GaN Substrate Wafer Market Share by Company Type (Tier 1, Tier 2, and Tier 3)

3.6 Global Free-standing GaN Substrate Wafer Average Price by Manufacturers (2020-2025)

3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types

3.8 Free-standing GaN Substrate Wafer Market Competitive Situation and Trends

- 3.8.1 Free-standing GaN Substrate Wafer Market Concentration Rate
- 3.8.2 Global 5 and 10 Largest Free-standing GaN Substrate Wafer Players Market Share by Revenue
- 3.8.3 Mergers & Acquisitions, Expansion

4 FREE-STANDING GAN SUBSTRATE WAFER INDUSTRY CHAIN ANALYSIS

- 4.1 Free-standing GaN Substrate Wafer Industry Chain Analysis
- 4.2 Market Overview of Key Raw Materials
- 4.3 Midstream Market Analysis
- 4.4 Downstream Customer Analysis

5 THE DEVELOPMENT AND DYNAMICS OF FREE-STANDING GAN SUBSTRATE WAFER MARKET

- 5.1 Key Development Trends
- 5.2 Driving Factors
- 5.3 Market Challenges
- 5.4 Industry News
 - 5.4.1 New Product Developments
 - 5.4.2 Mergers & Acquisitions
 - 5.4.3 Expansions
 - 5.4.4 Collaboration/Supply Contracts
- 5.5 PEST Analysis
 - 5.5.1 Industry Policies Analysis
 - 5.5.2 Economic Environment Analysis
 - 5.5.3 Social Environment Analysis
 - 5.5.4 Technological Environment Analysis
- 5.6 Global Free-standing GaN Substrate Wafer Market Porter's Five Forces Analysis
 - 5.6.1 Global Trade Frictions
 - 5.6.2 U.S. Tariff Policy ? April 2025
 - 5.6.3 Global Trade Frictions and Their Impacts to Free-standing GaN Substrate Wafer Market
- 5.7 ESG Ratings of Leading Companies

6 FREE-STANDING GAN SUBSTRATE WAFER MARKET SEGMENTATION BY TYPE

- 6.1 Evaluation Matrix of Segment Market Development Potential (Type)

6.2 Global Free-standing GaN Substrate Wafer Sales Market Share by Type (2020-2025)

6.3 Global Free-standing GaN Substrate Wafer Market Size by Type (2020-2025)

6.4 Global Free-standing GaN Substrate Wafer Price by Type (2020-2025)

7 FREE-STANDING GAN SUBSTRATE WAFER MARKET SEGMENTATION BY APPLICATION

7.1 Evaluation Matrix of Segment Market Development Potential (Application)

7.2 Global Free-standing GaN Substrate Wafer Market Sales by Application (2020-2025)

7.3 Global Free-standing GaN Substrate Wafer Market Size (M USD) by Application (2020-2025)

7.4 Global Free-standing GaN Substrate Wafer Sales Growth Rate by Application (2020-2025)

8 FREE-STANDING GAN SUBSTRATE WAFER MARKET SALES BY REGION

8.1 Global Free-standing GaN Substrate Wafer Sales by Region

8.1.1 Global Free-standing GaN Substrate Wafer Sales by Region

8.1.2 Global Free-standing GaN Substrate Wafer Sales Market Share by Region

8.2 Global Free-standing GaN Substrate Wafer Market Size by Region

8.2.1 Global Free-standing GaN Substrate Wafer Market Size by Region

8.2.2 Global Free-standing GaN Substrate Wafer Market Size by Region

8.3 North America

8.3.1 North America Free-standing GaN Substrate Wafer Sales by Country

8.3.2 North America Free-standing GaN Substrate Wafer Market Size by Country

8.3.3 U.S. Market Overview

8.3.4 Canada Market Overview

8.3.5 Mexico Market Overview

8.4 Europe

8.4.1 Europe Free-standing GaN Substrate Wafer Sales by Country

8.4.2 Europe Free-standing GaN Substrate Wafer Market Size by Country

8.4.3 Germany Market Overview

8.4.4 France Market Overview

8.4.5 U.K. Market Overview

8.4.6 Italy Market Overview

8.4.7 Spain Market Overview

8.5 Asia Pacific

- 8.5.1 Asia Pacific Free-standing GaN Substrate Wafer Sales by Region
- 8.5.2 Asia Pacific Free-standing GaN Substrate Wafer Market Size by Region
- 8.5.3 China Market Overview
- 8.5.4 Japan Market Overview
- 8.5.5 South Korea Market Overview
- 8.5.6 India Market Overview
- 8.5.7 Southeast Asia Market Overview
- 8.6 South America
 - 8.6.1 South America Free-standing GaN Substrate Wafer Sales by Country
 - 8.6.2 South America Free-standing GaN Substrate Wafer Market Size by Country
 - 8.6.3 Brazil Market Overview
 - 8.6.4 Argentina Market Overview
 - 8.6.5 Columbia Market Overview
- 8.7 Middle East and Africa
 - 8.7.1 Middle East and Africa Free-standing GaN Substrate Wafer Sales by Region
 - 8.7.2 Middle East and Africa Free-standing GaN Substrate Wafer Market Size by Region
 - 8.7.3 Saudi Arabia Market Overview
 - 8.7.4 UAE Market Overview
 - 8.7.5 Egypt Market Overview
 - 8.7.6 Nigeria Market Overview
 - 8.7.7 South Africa Market Overview

9 FREE-STANDING GAN SUBSTRATE WAFER MARKET PRODUCTION BY REGION

- 9.1 Global Production of Free-standing GaN Substrate Wafer by Region(2020-2025)
- 9.2 Global Free-standing GaN Substrate Wafer Revenue Market Share by Region (2020-2025)
- 9.3 Global Free-standing GaN Substrate Wafer Production, Revenue, Price and Gross Margin (2020-2025)
- 9.4 North America Free-standing GaN Substrate Wafer Production
 - 9.4.1 North America Free-standing GaN Substrate Wafer Production Growth Rate (2020-2025)
 - 9.4.2 North America Free-standing GaN Substrate Wafer Production, Revenue, Price and Gross Margin (2020-2025)
- 9.5 Europe Free-standing GaN Substrate Wafer Production
 - 9.5.1 Europe Free-standing GaN Substrate Wafer Production Growth Rate (2020-2025)

9.5.2 Europe Free-standing GaN Substrate Wafer Production, Revenue, Price and Gross Margin (2020-2025)

9.6 Japan Free-standing GaN Substrate Wafer Production (2020-2025)

9.6.1 Japan Free-standing GaN Substrate Wafer Production Growth Rate (2020-2025)

9.6.2 Japan Free-standing GaN Substrate Wafer Production, Revenue, Price and Gross Margin (2020-2025)

9.7 China Free-standing GaN Substrate Wafer Production (2020-2025)

9.7.1 China Free-standing GaN Substrate Wafer Production Growth Rate (2020-2025)

9.7.2 China Free-standing GaN Substrate Wafer Production, Revenue, Price and Gross Margin (2020-2025)

10 KEY COMPANIES PROFILE

10.1 Sumitomo Chemical (SCIOCS)

10.1.1 Sumitomo Chemical (SCIOCS) Basic Information

10.1.2 Sumitomo Chemical (SCIOCS) Free-standing GaN Substrate Wafer Product Overview

10.1.3 Sumitomo Chemical (SCIOCS) Free-standing GaN Substrate Wafer Product Market Performance

10.1.4 Sumitomo Chemical (SCIOCS) Business Overview

10.1.5 Sumitomo Chemical (SCIOCS) SWOT Analysis

10.1.6 Sumitomo Chemical (SCIOCS) Recent Developments

10.2 Mitsubishi Chemical

10.2.1 Mitsubishi Chemical Basic Information

10.2.2 Mitsubishi Chemical Free-standing GaN Substrate Wafer Product Overview

10.2.3 Mitsubishi Chemical Free-standing GaN Substrate Wafer Product Market Performance

10.2.4 Mitsubishi Chemical Business Overview

10.2.5 Mitsubishi Chemical SWOT Analysis

10.2.6 Mitsubishi Chemical Recent Developments

10.3 Sumitomo Electric Industries

10.3.1 Sumitomo Electric Industries Basic Information

10.3.2 Sumitomo Electric Industries Free-standing GaN Substrate Wafer Product Overview

10.3.3 Sumitomo Electric Industries Free-standing GaN Substrate Wafer Product Market Performance

10.3.4 Sumitomo Electric Industries Business Overview

10.3.5 Sumitomo Electric Industries SWOT Analysis

10.3.6 Sumitomo Electric Industries Recent Developments

10.4 Suzhou Nanowin Science and Technology

10.4.1 Suzhou Nanowin Science and Technology Basic Information

10.4.2 Suzhou Nanowin Science and Technology Free-standing GaN Substrate Wafer Product Overview

10.4.3 Suzhou Nanowin Science and Technology Free-standing GaN Substrate Wafer Product Market Performance

10.4.4 Suzhou Nanowin Science and Technology Business Overview

10.4.5 Suzhou Nanowin Science and Technology Recent Developments

10.5 Eta Research Ltd.

10.5.1 Eta Research Ltd. Basic Information

10.5.2 Eta Research Ltd. Free-standing GaN Substrate Wafer Product Overview

10.5.3 Eta Research Ltd. Free-standing GaN Substrate Wafer Product Market Performance

10.5.4 Eta Research Ltd. Business Overview

10.5.5 Eta Research Ltd. Recent Developments

10.6 Sino Nitride Semiconductor Technology

10.6.1 Sino Nitride Semiconductor Technology Basic Information

10.6.2 Sino Nitride Semiconductor Technology Free-standing GaN Substrate Wafer Product Overview

10.6.3 Sino Nitride Semiconductor Technology Free-standing GaN Substrate Wafer Product Market Performance

10.6.4 Sino Nitride Semiconductor Technology Business Overview

10.6.5 Sino Nitride Semiconductor Technology Recent Developments

10.7 PAM XIAMEN

10.7.1 PAM XIAMEN Basic Information

10.7.2 PAM XIAMEN Free-standing GaN Substrate Wafer Product Overview

10.7.3 PAM XIAMEN Free-standing GaN Substrate Wafer Product Market Performance

10.7.4 PAM XIAMEN Business Overview

10.7.5 PAM XIAMEN Recent Developments

10.8 Kyma Technologies

10.8.1 Kyma Technologies Basic Information

10.8.2 Kyma Technologies Free-standing GaN Substrate Wafer Product Overview

10.8.3 Kyma Technologies Free-standing GaN Substrate Wafer Product Market Performance

10.8.4 Kyma Technologies Business Overview

10.8.5 Kyma Technologies Recent Developments

10.9 Goetsu Semiconductor

10.9.1 Goetsu Semiconductor Basic Information

- 10.9.2 Goetsu Semiconductor Free-standing GaN Substrate Wafer Product Overview
- 10.9.3 Goetsu Semiconductor Free-standing GaN Substrate Wafer Product Market Performance
- 10.9.4 Goetsu Semiconductor Business Overview
- 10.9.5 Goetsu Semiconductor Recent Developments
- 10.10 Homray Material Technology (HMT)
 - 10.10.1 Homray Material Technology (HMT) Basic Information
 - 10.10.2 Homray Material Technology (HMT) Free-standing GaN Substrate Wafer Product Overview
 - 10.10.3 Homray Material Technology (HMT) Free-standing GaN Substrate Wafer Product Market Performance
 - 10.10.4 Homray Material Technology (HMT) Business Overview
 - 10.10.5 Homray Material Technology (HMT) Recent Developments

11 FREE-STANDING GAN SUBSTRATE WAFER MARKET FORECAST BY REGION

- 11.1 Global Free-standing GaN Substrate Wafer Market Size Forecast
- 11.2 Global Free-standing GaN Substrate Wafer Market Forecast by Region
 - 11.2.1 North America Market Size Forecast by Country
 - 11.2.2 Europe Free-standing GaN Substrate Wafer Market Size Forecast by Country
 - 11.2.3 Asia Pacific Free-standing GaN Substrate Wafer Market Size Forecast by Region
 - 11.2.4 South America Free-standing GaN Substrate Wafer Market Size Forecast by Country
 - 11.2.5 Middle East and Africa Forecasted Sales of Free-standing GaN Substrate Wafer by Country

12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)

- 12.1 Global Free-standing GaN Substrate Wafer Market Forecast by Type (2026-2035)
 - 12.1.1 Global Forecasted Sales of Free-standing GaN Substrate Wafer by Type (2026-2035)
 - 12.1.2 Global Free-standing GaN Substrate Wafer Market Size Forecast by Type (2026-2035)
 - 12.1.3 Global Forecasted Price of Free-standing GaN Substrate Wafer by Type (2026-2035)
- 12.2 Global Free-standing GaN Substrate Wafer Market Forecast by Application (2026-2035)
 - 12.2.1 Global Free-standing GaN Substrate Wafer Sales (K Units) Forecast by

Application

12.2.2 Global Free-standing GaN Substrate Wafer Market Size (M USD) Forecast by Application (2026-2035)

13 CONCLUSION AND KEY FINDINGS

List Of Tables

LIST OF TABLES

Table 1. Introduction of the Type

Table 2. Introduction of the Application

Table 3. Global Free-standing GaN Substrate Wafer Market Size by Type (M USD)

Table 4. Global Free-standing GaN Substrate Wafer Market Size by Application

Table 5. Free-standing GaN Substrate Wafer Market Size Comparison by Region (M USD)

Table 6. Global Free-standing GaN Substrate Wafer Sales (K Units) by Manufacturers (2020-2025)

Table 7. Global Free-standing GaN Substrate Wafer Sales Market Share by Manufacturers (2020-2025)

Table 8. Global Free-standing GaN Substrate Wafer Revenue (M USD) by Manufacturers (2020-2025)

Table 9. Global Free-standing GaN Substrate Wafer Revenue Share by Manufacturers (2020-2025)

Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in Free-standing GaN Substrate Wafer as of 2025)

Table 11. Global Market Free-standing GaN Substrate Wafer Average Price (USD/Unit) of Key Manufacturers (2020-2025)

Table 12. Manufacturers? Manufacturing Sites, Areas Served

Table 13. Manufacturers? Product Type

Table 14. Global Free-standing GaN Substrate Wafer Manufacturers Market Concentration Ratio (CR5 and HHI)

Table 15. Mergers & Acquisitions, Expansion Plans

Table 16. Market Overview of Key Raw Materials

Table 17. Midstream Market Analysis

Table 18. Downstream Customer Analysis

Table 19. Key Development Trends

Table 20. Driving Factors

Table 21. Free-standing GaN Substrate Wafer Market Challenges

Table 22. Goldman Sachs' forecast real GDP growth rate for 2025-2026

Table 23. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027

Table 24. World Bank ' Forecast Real GDP Growth Rate For 2025-2026

Table 25. The Tariff Rates Imposed by the United States on Major Commodity Trading Countries

Table 26. Global Free-standing GaN Substrate Wafer Sales by Type (K Units)

Table 27. Global Free-standing GaN Substrate Wafer Market Size by Type (M USD)

Table 28. Global Free-standing GaN Substrate Wafer Sales (K Units) by Type
(2020-2025)

Table 29. Global Free-standing GaN Substrate Wafer Sales Market Share by Type
(2020-2025)

Table 30. Global Free-standing GaN Substrate Wafer Market Size (M USD) by Type
(2020-2025)

Table 31. Global Free-standing GaN Substrate Wafer Market Share by Type
(2020-2025)

Table 32. Global Free-standing GaN Substrate Wafer Price (USD/Unit) by Type
(2020-2025)

Table 33. Global Free-standing GaN Substrate Wafer Sales (K Units) by Application

Table 34. Global Free-standing GaN Substrate Wafer Market Size by Application

Table 35. Global Free-standing GaN Substrate Wafer Sales by Application (2020-2025)
& (K Units)

Table 36. Global Free-standing GaN Substrate Wafer Sales Market Share by
Application (2020-2025)

Table 37. Global Free-standing GaN Substrate Wafer Market Size by Application
(2020-2025) & (M USD)

Table 38. Global Free-standing GaN Substrate Wafer Market Share by Application
(2020-2025)

Table 39. Global Free-standing GaN Substrate Wafer Sales Growth Rate by Application
(2020-2025)

Table 40. Global Free-standing GaN Substrate Wafer Sales by Region (2020-2025) &
(K Units)

Table 41. Global Free-standing GaN Substrate Wafer Sales Market Share by Region
(2020-2025)

Table 42. Global Free-standing GaN Substrate Wafer Market Size by Region
(2020-2025) & (M USD)

Table 43. Global Free-standing GaN Substrate Wafer Market Size by Region
(2020-2025)

Table 44. North America Free-standing GaN Substrate Wafer Sales by Country
(2020-2025) & (K Units)

Table 45. North America Free-standing GaN Substrate Wafer Market Size by Country
(2020-2025) & (M USD)

Table 46. Europe Free-standing GaN Substrate Wafer Sales by Country (2020-2025) &
(K Units)

Table 47. Europe Free-standing GaN Substrate Wafer Market Size by Country
(2020-2025) & (M USD)

Table 48. Asia Pacific Free-standing GaN Substrate Wafer Sales by Region (2020-2025) & (K Units)
Table 49. Asia Pacific Free-standing GaN Substrate Wafer Market Size by Region (2020-2025) & (M USD)
Table 50. South America Free-standing GaN Substrate Wafer Sales by Country (2020-2025) & (K Units)
Table 51. South America Free-standing GaN Substrate Wafer Market Size by Country (2020-2025) & (M USD)
Table 52. Middle East and Africa Free-standing GaN Substrate Wafer Sales by Region (2020-2025) & (K Units)
Table 53. Middle East and Africa Free-standing GaN Substrate Wafer Market Size by Region (2020-2025) & (M USD)
Table 54. Global Free-standing GaN Substrate Wafer Production (K Units) by Region(2020-2025)
Table 55. Global Free-standing GaN Substrate Wafer Revenue (US\$ Million) by Region (2020-2025)
Table 56. Global Free-standing GaN Substrate Wafer Revenue Market Share by Region (2020-2025)
Table 57. Global Free-standing GaN Substrate Wafer Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
Table 58. North America Free-standing GaN Substrate Wafer Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
Table 59. Europe Free-standing GaN Substrate Wafer Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
Table 60. Japan Free-standing GaN Substrate Wafer Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
Table 61. China Free-standing GaN Substrate Wafer Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
Table 62. Sumitomo Chemical (SCIOCS) Basic Information
Table 63. Sumitomo Chemical (SCIOCS) Free-standing GaN Substrate Wafer Product Overview
Table 64. Sumitomo Chemical (SCIOCS) Free-standing GaN Substrate Wafer Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
Table 65. Sumitomo Chemical (SCIOCS) Business Overview
Table 66. Sumitomo Chemical (SCIOCS) SWOT Analysis
Table 67. Sumitomo Chemical (SCIOCS) Recent Developments
Table 68. Mitsubishi Chemical Basic Information
Table 69. Mitsubishi Chemical Free-standing GaN Substrate Wafer Product Overview
Table 70. Mitsubishi Chemical Free-standing GaN Substrate Wafer Sales (K Units),

Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 71. Mitsubishi Chemical Business Overview

Table 72. Mitsubishi Chemical SWOT Analysis

Table 73. Mitsubishi Chemical Recent Developments

Table 74. Sumitomo Electric Industries Basic Information

Table 75. Sumitomo Electric Industries Free-standing GaN Substrate Wafer Product Overview

Table 76. Sumitomo Electric Industries Free-standing GaN Substrate Wafer Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 77. Sumitomo Electric Industries Business Overview

Table 78. Sumitomo Electric Industries SWOT Analysis

Table 79. Sumitomo Electric Industries Recent Developments

Table 80. Suzhou Nanowin Science and Technology Basic Information

Table 81. Suzhou Nanowin Science and Technology Free-standing GaN Substrate Wafer Product Overview

Table 82. Suzhou Nanowin Science and Technology Free-standing GaN Substrate Wafer Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 83. Suzhou Nanowin Science and Technology Business Overview

Table 84. Suzhou Nanowin Science and Technology Recent Developments

Table 85. Eta Research Ltd. Basic Information

Table 86. Eta Research Ltd. Free-standing GaN Substrate Wafer Product Overview

Table 87. Eta Research Ltd. Free-standing GaN Substrate Wafer Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 88. Eta Research Ltd. Business Overview

Table 89. Eta Research Ltd. Recent Developments

Table 90. Sino Nitride Semiconductor Technology Basic Information

Table 91. Sino Nitride Semiconductor Technology Free-standing GaN Substrate Wafer Product Overview

Table 92. Sino Nitride Semiconductor Technology Free-standing GaN Substrate Wafer Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 93. Sino Nitride Semiconductor Technology Business Overview

Table 94. Sino Nitride Semiconductor Technology Recent Developments

Table 95. PAM XIAMEN Basic Information

Table 96. PAM XIAMEN Free-standing GaN Substrate Wafer Product Overview

Table 97. PAM XIAMEN Free-standing GaN Substrate Wafer Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 98. PAM XIAMEN Business Overview

Table 99. PAM XIAMEN Recent Developments

Table 100. Kyma Technologies Basic Information
Table 101. Kyma Technologies Free-standing GaN Substrate Wafer Product Overview
Table 102. Kyma Technologies Free-standing GaN Substrate Wafer Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
Table 103. Kyma Technologies Business Overview
Table 104. Kyma Technologies Recent Developments
Table 105. Goetsu Semiconductor Basic Information
Table 106. Goetsu Semiconductor Free-standing GaN Substrate Wafer Product Overview
Table 107. Goetsu Semiconductor Free-standing GaN Substrate Wafer Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
Table 108. Goetsu Semiconductor Business Overview
Table 109. Goetsu Semiconductor Recent Developments
Table 110. Homray Material Technology (HMT) Basic Information
Table 111. Homray Material Technology (HMT) Free-standing GaN Substrate Wafer Product Overview
Table 112. Homray Material Technology (HMT) Free-standing GaN Substrate Wafer Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
Table 113. Homray Material Technology (HMT) Business Overview
Table 114. Homray Material Technology (HMT) Recent Developments
Table 115. Global Free-standing GaN Substrate Wafer Sales Forecast by Region (2026-2035) & (K Units)
Table 116. Global Free-standing GaN Substrate Wafer Market Size Forecast by Region (2026-2035) & (M USD)
Table 117. North America Free-standing GaN Substrate Wafer Sales Forecast by Country (2026-2035) & (K Units)
Table 118. North America Free-standing GaN Substrate Wafer Market Size Forecast by Country (2026-2035) & (M USD)
Table 119. Europe Free-standing GaN Substrate Wafer Sales Forecast by Country (2026-2035) & (K Units)
Table 120. Europe Free-standing GaN Substrate Wafer Market Size Forecast by Country (2026-2035) & (M USD)
Table 121. Asia Pacific Free-standing GaN Substrate Wafer Sales Forecast by Region (2026-2035) & (K Units)
Table 122. Asia Pacific Free-standing GaN Substrate Wafer Market Size Forecast by Region (2026-2035) & (M USD)
Table 123. South America Free-standing GaN Substrate Wafer Sales Forecast by Country (2026-2035) & (K Units)
Table 124. South America Free-standing GaN Substrate Wafer Market Size Forecast by

Country (2026-2035) & (M USD)

Table 125. Middle East and Africa Free-standing GaN Substrate Wafer Sales Forecast by Country (2026-2035) & (Units)

Table 126. Middle East and Africa Free-standing GaN Substrate Wafer Market Size Forecast by Country (2026-2035) & (M USD)

Table 127. Global Free-standing GaN Substrate Wafer Sales Forecast by Type (2026-2035) & (K Units)

Table 128. Global Free-standing GaN Substrate Wafer Market Size Forecast by Type (2026-2035) & (M USD)

Table 129. Global Free-standing GaN Substrate Wafer Price Forecast by Type (2026-2035) & (USD/Unit)

Table 130. Global Free-standing GaN Substrate Wafer Sales (K Units) Forecast by Application (2026-2035)

Table 131. Global Free-standing GaN Substrate Wafer Market Size Forecast by Application (2026-2035) & (M USD)

List Of Figures

LIST OF FIGURES

- Figure 1. Product Picture of Free-standing GaN Substrate Wafer
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global Free-standing GaN Substrate Wafer Market Size (M USD), 2025-2035
- Figure 5. Global Free-standing GaN Substrate Wafer Market Size (M USD) (2020-2035)
- Figure 6. Global Free-standing GaN Substrate Wafer Sales (K Units) & (2020-2035)
- Figure 7. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 8. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 9. Evaluation Matrix of Regional Market Development Potential
- Figure 10. Free-standing GaN Substrate Wafer Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global Free-standing GaN Substrate Wafer Product Life Cycle
- Figure 13. Free-standing GaN Substrate Wafer Sales Share by Manufacturers in 2025
- Figure 14. Global Free-standing GaN Substrate Wafer Revenue Share by Manufacturers in 2025
- Figure 15. Free-standing GaN Substrate Wafer Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market Free-standing GaN Substrate Wafer Average Price (USD/Unit) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by Free-standing GaN Substrate Wafer Revenue in 2025
- Figure 18. Industry Chain Map of Free-standing GaN Substrate Wafer
- Figure 19. Global Free-standing GaN Substrate Wafer Market PEST Analysis
- Figure 20. Global Free-standing GaN Substrate Wafer Market Porter's Five Forces Analysis
- Figure 21. Global Merchandise Trade as a Percentage Of GDP
- Figure 22. US - Imports of Goods by Country
- Figure 23. China Exports by Country
- Figure 24. ESG Rating Distribution of The Leading Company Compared With Its Peers
- Figure 25. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 26. Global Free-standing GaN Substrate Wafer Market Share by Type
- Figure 27. Sales Market Share of Free-standing GaN Substrate Wafer by Type (2020-2025)
- Figure 28. Sales Market Share of Free-standing GaN Substrate Wafer by Type in 2025
- Figure 29. Market Share of Free-standing GaN Substrate Wafer by Type (2020-2025)

Figure 30. Market Share of Free-standing GaN Substrate Wafer by Type in 2025

Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)

Figure 32. Global Free-standing GaN Substrate Wafer Market Share by Application

Figure 33. Global Free-standing GaN Substrate Wafer Sales Market Share by Application (2020-2025)

Figure 34. Global Free-standing GaN Substrate Wafer Sales Market Share by Application in 2025

Figure 35. Global Free-standing GaN Substrate Wafer Market Share by Application (2020-2025)

Figure 36. Global Free-standing GaN Substrate Wafer Market Share by Application in 2025

Figure 37. Global Free-standing GaN Substrate Wafer Sales Growth Rate by Application (2020-2025)

Figure 38. Global Free-standing GaN Substrate Wafer Sales Market Share by Region (2020-2025)

Figure 39. Global Free-standing GaN Substrate Wafer Market Size by Region (2020-2025)

Figure 40. North America Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 41. North America Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 42. North America Free-standing GaN Substrate Wafer Sales Market Share by Country in 2024

Figure 43. North America Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 44. North America Free-standing GaN Substrate Wafer Market Size by Country in 2024

Figure 45. U.S. Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 46. U.S. Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 47. Canada Free-standing GaN Substrate Wafer Sales (K Units) and Growth Rate (2020-2025)

Figure 48. Canada Free-standing GaN Substrate Wafer Market Size (M USD) and Growth Rate (2020-2025)

Figure 49. Mexico Free-standing GaN Substrate Wafer Sales (Units) and Growth Rate (2020-2025)

Figure 50. Mexico Free-standing GaN Substrate Wafer Market Size (Units) and Growth Rate (2020-2025)

Figure 51. Europe Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 52. Europe Free-standing GaN Substrate Wafer Sales Market Share by Country in 2024

Figure 53. Europe Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 54. Europe Free-standing GaN Substrate Wafer Market Size by Country in 2024

Figure 55. Germany Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 56. Germany Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 57. France Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 58. France Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 59. U.K. Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 60. U.K. Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 62. Italy Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 64. Spain Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific Free-standing GaN Substrate Wafer Sales and Growth Rate (K Units)

Figure 66. Asia Pacific Free-standing GaN Substrate Wafer Sales Market Share by Region in 2024

Figure 67. Asia Pacific Free-standing GaN Substrate Wafer Market Size by Region in 2024

Figure 68. China Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 69. China Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 71. Japan Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 72. South Korea Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 73. South Korea Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 74. India Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 75. India Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 76. Southeast Asia Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 77. Southeast Asia Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 78. South America Free-standing GaN Substrate Wafer Sales and Growth Rate (K Units)

Figure 79. South America Free-standing GaN Substrate Wafer Sales Market Share by Country in 2024

Figure 80. South America Free-standing GaN Substrate Wafer Market Size and Growth Rate (M USD)

Figure 81. South America Free-standing GaN Substrate Wafer Market Size by Country in 2024

Figure 82. Brazil Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 83. Brazil Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 84. Argentina Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 85. Argentina Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 86. Columbia Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 87. Columbia Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 88. Middle East and Africa Free-standing GaN Substrate Wafer Sales and Growth Rate (K Units)

Figure 89. Middle East and Africa Free-standing GaN Substrate Wafer Sales Market Share by Region in 2024

Figure 90. Middle East and Africa Free-standing GaN Substrate Wafer Market Size and

Growth Rate (M USD)

Figure 91. Middle East and Africa Free-standing GaN Substrate Wafer Market Size by Region in 2024

Figure 92. Saudi Arabia Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 93. Saudi Arabia Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 94. UAE Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 95. UAE Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 96. Egypt Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 97. Egypt Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 98. Nigeria Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 99. Nigeria Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 100. South Africa Free-standing GaN Substrate Wafer Sales and Growth Rate (2020-2025) & (K Units)

Figure 101. South Africa Free-standing GaN Substrate Wafer Market Size and Growth Rate (2020-2025) & (M USD)

Figure 102. Global Free-standing GaN Substrate Wafer Production Market Share by Region (2020-2025)

Figure 103. North America Free-standing GaN Substrate Wafer Production (K Units) Growth Rate (2020-2025)

Figure 104. Europe Free-standing GaN Substrate Wafer Production (K Units) Growth Rate (2020-2025)

Figure 105. Japan Free-standing GaN Substrate Wafer Production (K Units) Growth Rate (2020-2025)

Figure 106. China Free-standing GaN Substrate Wafer Production (K Units) Growth Rate (2020-2025)

Figure 107. Global Free-standing GaN Substrate Wafer Sales Forecast by Volume (2020-2035) & (K Units)

Figure 108. Global Free-standing GaN Substrate Wafer Market Size Forecast by Value (2020-2035) & (M USD)

Figure 109. Global Free-standing GaN Substrate Wafer Sales Market Share Forecast by Type (2026-2035)

Figure 110. Global Free-standing GaN Substrate Wafer Market Share Forecast by Type (2026-2035)

Figure 111. Global Free-standing GaN Substrate Wafer Sales Forecast by Application (2026-2035)

Figure 112. Global Free-standing GaN Substrate Wafer Market Share Forecast by Application (2026-2035)

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