

Global Freestanding GaN Substrate Market Research Report 2026(Status and Outlook)

<https://marketpublishers.com/r/G3881F6A7D00EN.html>

Date: March 2026

Pages: 142

Price: US\$ 2,980.00 (Single User License)

ID: G3881F6A7D00EN

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 Freestanding GaN Substrate competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. A freestanding GaN substrate refers to a self-supporting wafer composed entirely of single-crystal gallium nitride, without any foreign base material such as sapphire, silicon, or SiC. It is typically produced through methods like hydride vapor phase epitaxy (HVPE) or ammonothermal growth, followed by substrate separation and polishing. Compared with GaN-on-foreign-substrate wafers, freestanding GaN substrates offer much lower dislocation density, superior thermal conductivity, and better lattice matching for epitaxial layers, which significantly improves the performance and reliability of power devices, RF components, and optoelectronic products such as laser diodes and micro-LEDs. Freestanding GaN Substrate 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. 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 Freestanding GaN Substrate 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 Freestanding GaN Substrate 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 Freestanding GaN Substrate 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 Freestanding GaN Substrate market.

Global Freestanding GaN Substrate 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-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 Freestanding GaN Substrate Market

Overview of the regional outlook of the Freestanding GaN Substrate 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 Freestanding GaN Substrate 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 Freestanding GaN Substrate, 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 Freestanding GaN Substrate

1.2 Key Market Segments

1.2.1 Freestanding GaN Substrate Segment by Type

1.2.2 Freestanding GaN Substrate 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 FREESTANDING GAN SUBSTRATE MARKET OVERVIEW

2.1 Global Market Overview

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

2.1.2 Global Freestanding GaN Substrate Sales Estimates and Forecasts (2020-2035)

2.2 Market Segment Executive Summary

2.3 Global Market Size by Region

3 FREESTANDING GAN SUBSTRATE MARKET COMPETITIVE LANDSCAPE

3.1 Company Assessment Quadrant

3.2 Global Freestanding GaN Substrate Product Life Cycle

3.3 Global Freestanding GaN Substrate Sales by Manufacturers (2020-2025)

3.4 Global Freestanding GaN Substrate Revenue Market Share by Manufacturers (2020-2025)

3.5 Freestanding GaN Substrate Market Share by Company Type (Tier 1, Tier 2, and Tier 3)

3.6 Global Freestanding GaN Substrate Average Price by Manufacturers (2020-2025)

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

3.8 Freestanding GaN Substrate Market Competitive Situation and Trends

3.8.1 Freestanding GaN Substrate Market Concentration Rate

3.8.2 Global 5 and 10 Largest Freestanding GaN Substrate Players Market Share by Revenue

3.8.3 Mergers & Acquisitions, Expansion

4 FREESTANDING GAN SUBSTRATE INDUSTRY CHAIN ANALYSIS

4.1 Freestanding GaN Substrate 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 FREESTANDING GAN SUBSTRATE 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 Freestanding GaN Substrate 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 Freestanding GaN Substrate Market

5.7 ESG Ratings of Leading Companies

6 FREESTANDING GAN SUBSTRATE MARKET SEGMENTATION BY TYPE

6.1 Evaluation Matrix of Segment Market Development Potential (Type)

6.2 Global Freestanding GaN Substrate Sales Market Share by Type (2020-2025)

6.3 Global Freestanding GaN Substrate Market Size by Type (2020-2025)

6.4 Global Freestanding GaN Substrate Price by Type (2020-2025)

7 FREESTANDING GAN SUBSTRATE MARKET SEGMENTATION BY

APPLICATION

- 7.1 Evaluation Matrix of Segment Market Development Potential (Application)
- 7.2 Global Freestanding GaN Substrate Market Sales by Application (2020-2025)
- 7.3 Global Freestanding GaN Substrate Market Size (M USD) by Application (2020-2025)
- 7.4 Global Freestanding GaN Substrate Sales Growth Rate by Application (2020-2025)

8 FREESTANDING GAN SUBSTRATE MARKET SALES BY REGION

- 8.1 Global Freestanding GaN Substrate Sales by Region
 - 8.1.1 Global Freestanding GaN Substrate Sales by Region
 - 8.1.2 Global Freestanding GaN Substrate Sales Market Share by Region
- 8.2 Global Freestanding GaN Substrate Market Size by Region
 - 8.2.1 Global Freestanding GaN Substrate Market Size by Region
 - 8.2.2 Global Freestanding GaN Substrate Market Size by Region
- 8.3 North America
 - 8.3.1 North America Freestanding GaN Substrate Sales by Country
 - 8.3.2 North America Freestanding GaN Substrate 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 Freestanding GaN Substrate Sales by Country
 - 8.4.2 Europe Freestanding GaN Substrate 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 Freestanding GaN Substrate Sales by Region
 - 8.5.2 Asia Pacific Freestanding GaN Substrate 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 Freestanding GaN Substrate Sales by Country
- 8.6.2 South America Freestanding GaN Substrate 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 Freestanding GaN Substrate Sales by Region
 - 8.7.2 Middle East and Africa Freestanding GaN Substrate 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 FREESTANDING GAN SUBSTRATE MARKET PRODUCTION BY REGION

- 9.1 Global Production of Freestanding GaN Substrate by Region(2020-2025)
- 9.2 Global Freestanding GaN Substrate Revenue Market Share by Region (2020-2025)
- 9.3 Global Freestanding GaN Substrate Production, Revenue, Price and Gross Margin (2020-2025)
- 9.4 North America Freestanding GaN Substrate Production
 - 9.4.1 North America Freestanding GaN Substrate Production Growth Rate (2020-2025)
 - 9.4.2 North America Freestanding GaN Substrate Production, Revenue, Price and Gross Margin (2020-2025)
- 9.5 Europe Freestanding GaN Substrate Production
 - 9.5.1 Europe Freestanding GaN Substrate Production Growth Rate (2020-2025)
 - 9.5.2 Europe Freestanding GaN Substrate Production, Revenue, Price and Gross Margin (2020-2025)
- 9.6 Japan Freestanding GaN Substrate Production (2020-2025)
 - 9.6.1 Japan Freestanding GaN Substrate Production Growth Rate (2020-2025)
 - 9.6.2 Japan Freestanding GaN Substrate Production, Revenue, Price and Gross Margin (2020-2025)
- 9.7 China Freestanding GaN Substrate Production (2020-2025)
 - 9.7.1 China Freestanding GaN Substrate Production Growth Rate (2020-2025)
 - 9.7.2 China Freestanding GaN Substrate 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) Freestanding GaN Substrate Product Overview

10.1.3 Sumitomo Chemical (SCIOCS) Freestanding GaN Substrate 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 Freestanding GaN Substrate Product Overview

10.2.3 Mitsubishi Chemical Freestanding GaN Substrate 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 Freestanding GaN Substrate Product Overview

10.3.3 Sumitomo Electric Industries Freestanding GaN Substrate 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 Freestanding GaN Substrate Product Overview

10.4.3 Suzhou Nanowin Science and Technology Freestanding GaN Substrate 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. Freestanding GaN Substrate Product Overview

10.5.3 Eta Research Ltd. Freestanding GaN Substrate 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 Freestanding GaN Substrate Product Overview
- 10.6.3 Sino Nitride Semiconductor Technology Freestanding GaN Substrate 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 Freestanding GaN Substrate Product Overview
 - 10.7.3 PAM XIAMEN Freestanding GaN Substrate 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 Freestanding GaN Substrate Product Overview
 - 10.8.3 Kyma Technologies Freestanding GaN Substrate 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 Freestanding GaN Substrate Product Overview
 - 10.9.3 Goetsu Semiconductor Freestanding GaN Substrate 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) Freestanding GaN Substrate Product Overview
 - 10.10.3 Homray Material Technology (HMT) Freestanding GaN Substrate Product Market Performance
 - 10.10.4 Homray Material Technology (HMT) Business Overview
 - 10.10.5 Homray Material Technology (HMT) Recent Developments

11 FREESTANDING GAN SUBSTRATE MARKET FORECAST BY REGION

- 11.1 Global Freestanding GaN Substrate Market Size Forecast
- 11.2 Global Freestanding GaN Substrate Market Forecast by Region

- 11.2.1 North America Market Size Forecast by Country
- 11.2.2 Europe Freestanding GaN Substrate Market Size Forecast by Country
- 11.2.3 Asia Pacific Freestanding GaN Substrate Market Size Forecast by Region
- 11.2.4 South America Freestanding GaN Substrate Market Size Forecast by Country
- 11.2.5 Middle East and Africa Forecasted Sales of Freestanding GaN Substrate by Country

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

- 12.1 Global Freestanding GaN Substrate Market Forecast by Type (2026-2035)
 - 12.1.1 Global Forecasted Sales of Freestanding GaN Substrate by Type (2026-2035)
 - 12.1.2 Global Freestanding GaN Substrate Market Size Forecast by Type (2026-2035)
 - 12.1.3 Global Forecasted Price of Freestanding GaN Substrate by Type (2026-2035)
- 12.2 Global Freestanding GaN Substrate Market Forecast by Application (2026-2035)
 - 12.2.1 Global Freestanding GaN Substrate Sales (K Units) Forecast by Application
 - 12.2.2 Global Freestanding GaN Substrate 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 Freestanding GaN Substrate Market Size by Type (M USD)

Table 4. Global Freestanding GaN Substrate Market Size by Application

Table 5. Freestanding GaN Substrate Market Size Comparison by Region (M USD)

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

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

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

Table 9. Global Freestanding GaN Substrate Revenue Share by Manufacturers
(2020-2025)

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

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

Table 12. Manufacturers? Manufacturing Sites, Areas Served

Table 13. Manufacturers? Product Type

Table 14. Global Freestanding GaN Substrate 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. Freestanding GaN Substrate 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 Freestanding GaN Substrate Sales by Type (K Units)

Table 27. Global Freestanding GaN Substrate Market Size by Type (M USD)

Table 28. Global Freestanding GaN Substrate Sales (K Units) by Type (2020-2025)
Table 29. Global Freestanding GaN Substrate Sales Market Share by Type (2020-2025)
Table 30. Global Freestanding GaN Substrate Market Size (M USD) by Type (2020-2025)
Table 31. Global Freestanding GaN Substrate Market Share by Type (2020-2025)
Table 32. Global Freestanding GaN Substrate Price (USD/Unit) by Type (2020-2025)
Table 33. Global Freestanding GaN Substrate Sales (K Units) by Application
Table 34. Global Freestanding GaN Substrate Market Size by Application
Table 35. Global Freestanding GaN Substrate Sales by Application (2020-2025) & (K Units)
Table 36. Global Freestanding GaN Substrate Sales Market Share by Application (2020-2025)
Table 37. Global Freestanding GaN Substrate Market Size by Application (2020-2025) & (M USD)
Table 38. Global Freestanding GaN Substrate Market Share by Application (2020-2025)
Table 39. Global Freestanding GaN Substrate Sales Growth Rate by Application (2020-2025)
Table 40. Global Freestanding GaN Substrate Sales by Region (2020-2025) & (K Units)
Table 41. Global Freestanding GaN Substrate Sales Market Share by Region (2020-2025)
Table 42. Global Freestanding GaN Substrate Market Size by Region (2020-2025) & (M USD)
Table 43. Global Freestanding GaN Substrate Market Size by Region (2020-2025)
Table 44. North America Freestanding GaN Substrate Sales by Country (2020-2025) & (K Units)
Table 45. North America Freestanding GaN Substrate Market Size by Country (2020-2025) & (M USD)
Table 46. Europe Freestanding GaN Substrate Sales by Country (2020-2025) & (K Units)
Table 47. Europe Freestanding GaN Substrate Market Size by Country (2020-2025) & (M USD)
Table 48. Asia Pacific Freestanding GaN Substrate Sales by Region (2020-2025) & (K Units)
Table 49. Asia Pacific Freestanding GaN Substrate Market Size by Region (2020-2025) & (M USD)
Table 50. South America Freestanding GaN Substrate Sales by Country (2020-2025) & (K Units)
Table 51. South America Freestanding GaN Substrate Market Size by Country (2020-2025) & (M USD)

Table 52. Middle East and Africa Freestanding GaN Substrate Sales by Region (2020-2025) & (K Units)

Table 53. Middle East and Africa Freestanding GaN Substrate Market Size by Region (2020-2025) & (M USD)

Table 54. Global Freestanding GaN Substrate Production (K Units) by Region(2020-2025)

Table 55. Global Freestanding GaN Substrate Revenue (US\$ Million) by Region (2020-2025)

Table 56. Global Freestanding GaN Substrate Revenue Market Share by Region (2020-2025)

Table 57. Global Freestanding GaN Substrate Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 58. North America Freestanding GaN Substrate Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 59. Europe Freestanding GaN Substrate Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 60. Japan Freestanding GaN Substrate Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 61. China Freestanding GaN Substrate 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) Freestanding GaN Substrate Product Overview

Table 64. Sumitomo Chemical (SCIOCS) Freestanding GaN Substrate 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 Freestanding GaN Substrate Product Overview

Table 70. Mitsubishi Chemical Freestanding GaN Substrate 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 Freestanding GaN Substrate Product Overview

Table 76. Sumitomo Electric Industries Freestanding GaN Substrate 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 Freestanding GaN Substrate Product Overview
Table 82. Suzhou Nanowin Science and Technology Freestanding GaN Substrate 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. Freestanding GaN Substrate Product Overview
Table 87. Eta Research Ltd. Freestanding GaN Substrate 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 Freestanding GaN Substrate Product Overview
Table 92. Sino Nitride Semiconductor Technology Freestanding GaN Substrate 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 Freestanding GaN Substrate Product Overview
Table 97. PAM XIAMEN Freestanding GaN Substrate 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 Freestanding GaN Substrate Product Overview
Table 102. Kyma Technologies Freestanding GaN Substrate 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 Freestanding GaN Substrate Product Overview
Table 107. Goetsu Semiconductor Freestanding GaN Substrate 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) Freestanding GaN Substrate Product Overview
Table 112. Homray Material Technology (HMT) Freestanding GaN Substrate 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 Freestanding GaN Substrate Sales Forecast by Region (2026-2035) & (K Units)
Table 116. Global Freestanding GaN Substrate Market Size Forecast by Region (2026-2035) & (M USD)
Table 117. North America Freestanding GaN Substrate Sales Forecast by Country (2026-2035) & (K Units)
Table 118. North America Freestanding GaN Substrate Market Size Forecast by Country (2026-2035) & (M USD)
Table 119. Europe Freestanding GaN Substrate Sales Forecast by Country (2026-2035) & (K Units)
Table 120. Europe Freestanding GaN Substrate Market Size Forecast by Country (2026-2035) & (M USD)
Table 121. Asia Pacific Freestanding GaN Substrate Sales Forecast by Region (2026-2035) & (K Units)
Table 122. Asia Pacific Freestanding GaN Substrate Market Size Forecast by Region (2026-2035) & (M USD)
Table 123. South America Freestanding GaN Substrate Sales Forecast by Country (2026-2035) & (K Units)
Table 124. South America Freestanding GaN Substrate Market Size Forecast by Country (2026-2035) & (M USD)
Table 125. Middle East and Africa Freestanding GaN Substrate Sales Forecast by Country (2026-2035) & (Units)
Table 126. Middle East and Africa Freestanding GaN Substrate Market Size Forecast by Country (2026-2035) & (M USD)
Table 127. Global Freestanding GaN Substrate Sales Forecast by Type (2026-2035) & (K Units)
Table 128. Global Freestanding GaN Substrate Market Size Forecast by Type (2026-2035) & (M USD)
Table 129. Global Freestanding GaN Substrate Price Forecast by Type (2026-2035) & (USD/Unit)

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

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

List Of Figures

LIST OF FIGURES

- Figure 1. Product Picture of Freestanding GaN Substrate
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global Freestanding GaN Substrate Market Size (M USD), 2025-2035
- Figure 5. Global Freestanding GaN Substrate Market Size (M USD) (2020-2035)
- Figure 6. Global Freestanding GaN Substrate 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. Freestanding GaN Substrate Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global Freestanding GaN Substrate Product Life Cycle
- Figure 13. Freestanding GaN Substrate Sales Share by Manufacturers in 2025
- Figure 14. Global Freestanding GaN Substrate Revenue Share by Manufacturers in 2025
- Figure 15. Freestanding GaN Substrate Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market Freestanding GaN Substrate Average Price (USD/Unit) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by Freestanding GaN Substrate Revenue in 2025
- Figure 18. Industry Chain Map of Freestanding GaN Substrate
- Figure 19. Global Freestanding GaN Substrate Market PEST Analysis
- Figure 20. Global Freestanding GaN Substrate 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 Freestanding GaN Substrate Market Share by Type
- Figure 27. Sales Market Share of Freestanding GaN Substrate by Type (2020-2025)
- Figure 28. Sales Market Share of Freestanding GaN Substrate by Type in 2025
- Figure 29. Market Share of Freestanding GaN Substrate by Type (2020-2025)
- Figure 30. Market Share of Freestanding GaN Substrate by Type in 2025
- Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)

- Figure 32. Global Freestanding GaN Substrate Market Share by Application
- Figure 33. Global Freestanding GaN Substrate Sales Market Share by Application (2020-2025)
- Figure 34. Global Freestanding GaN Substrate Sales Market Share by Application in 2025
- Figure 35. Global Freestanding GaN Substrate Market Share by Application (2020-2025)
- Figure 36. Global Freestanding GaN Substrate Market Share by Application in 2025
- Figure 37. Global Freestanding GaN Substrate Sales Growth Rate by Application (2020-2025)
- Figure 38. Global Freestanding GaN Substrate Sales Market Share by Region (2020-2025)
- Figure 39. Global Freestanding GaN Substrate Market Size by Region (2020-2025)
- Figure 40. North America Freestanding GaN Substrate Sales and Growth Rate (2020-2025) & (K Units)
- Figure 41. North America Freestanding GaN Substrate Sales and Growth Rate (2020-2025) & (K Units)
- Figure 42. North America Freestanding GaN Substrate Sales Market Share by Country in 2024
- Figure 43. North America Freestanding GaN Substrate Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 44. North America Freestanding GaN Substrate Market Size by Country in 2024
- Figure 45. U.S. Freestanding GaN Substrate Sales and Growth Rate (2020-2025) & (K Units)
- Figure 46. U.S. Freestanding GaN Substrate Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 47. Canada Freestanding GaN Substrate Sales (K Units) and Growth Rate (2020-2025)
- Figure 48. Canada Freestanding GaN Substrate Market Size (M USD) and Growth Rate (2020-2025)
- Figure 49. Mexico Freestanding GaN Substrate Sales (Units) and Growth Rate (2020-2025)
- Figure 50. Mexico Freestanding GaN Substrate Market Size (Units) and Growth Rate (2020-2025)
- Figure 51. Europe Freestanding GaN Substrate Sales and Growth Rate (2020-2025) & (K Units)
- Figure 52. Europe Freestanding GaN Substrate Sales Market Share by Country in 2024
- Figure 53. Europe Freestanding GaN Substrate Market Size and Growth Rate (2020-2025) & (M USD)

Figure 54. Europe Freestanding GaN Substrate Market Size by Country in 2024

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

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

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

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

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

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

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

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

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

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

Figure 65. Asia Pacific Freestanding GaN Substrate Sales and Growth Rate (K Units)

Figure 66. Asia Pacific Freestanding GaN Substrate Sales Market Share by Region in 2024

Figure 67. Asia Pacific Freestanding GaN Substrate Market Size by Region in 2024

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

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

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

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

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

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

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

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

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

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

Figure 78. South America Freestanding GaN Substrate Sales and Growth Rate (K Units)

Figure 79. South America Freestanding GaN Substrate Sales Market Share by Country in 2024

Figure 80. South America Freestanding GaN Substrate Market Size and Growth Rate (M USD)

Figure 81. South America Freestanding GaN Substrate Market Size by Country in 2024

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

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

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

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

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

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

Figure 88. Middle East and Africa Freestanding GaN Substrate Sales and Growth Rate (K Units)

Figure 89. Middle East and Africa Freestanding GaN Substrate Sales Market Share by Region in 2024

Figure 90. Middle East and Africa Freestanding GaN Substrate Market Size and Growth Rate (M USD)

Figure 91. Middle East and Africa Freestanding GaN Substrate Market Size by Region in 2024

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Figure 111. Global Freestanding GaN Substrate Sales Forecast by Application (2026-2035)

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

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