

Global Fourth-generation Semiconductor Materials Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Fourth-generation Semiconductor Materials market size was valued at US\$ 156 million in 2025 and is forecast to a readjusted size of US\$ 729 million by 2032 with a CAGR of 23.6% during review period.

Fourth-generation semiconductor materials refer to a class of next-generation semiconductor materials with bandgaps materially wider than conventional silicon and most established third-generation wide-bandgap materials. This study focuses on semiconductor-grade materials represented by gallium oxide, single-crystal diamond, aluminum nitride, and boron nitride, covering single-crystal substrates, epitaxial wafers, epitaxial templates, electronic-grade crystals, CVD films, and customized materials for device R&D and pilot commercialization. These materials are valued for their high critical electric field, broad optical transparency, high thermal stability, high thermal conductivity, radiation tolerance, and suitability for extreme-environment operation. Their key application domains include next-generation power electronics, RF devices, deep-ultraviolet emitters and detectors, solar-blind UV detection, quantum devices, radiation detectors, and high-heat-flux semiconductor thermal management. The research scope is centered on real material manufacturers and suppliers rather than downstream device makers, ordinary ceramics, equipment vendors, or trading companies.

Based on our research, fourth-generation semiconductor materials remain an emerging industry where the material advantages are increasingly clear, but large-scale device commercialization is still at an early stage. The sector should not be viewed as a direct one-for-one replacement for silicon, SiC, or GaN. Instead, its value lies in enabling new

device windows in high-voltage, high-temperature, deep-ultraviolet, quantum, radiation-hard, and high-heat-flux environments. Gallium oxide offers attractive melt-growth and cost potential for high-voltage power devices, but still faces thermal conductivity, p-type doping, and reliability challenges. Diamond provides exceptional thermal conductivity, radiation tolerance, and wide-bandgap properties, making it compelling for quantum devices, detectors, RF thermal management, and eventually power electronics. Aluminum nitride is closer to commercialization in certain niches because of its relevance to UVC, RF, power, and high-temperature piezoelectric applications. Boron nitride remains more research-oriented, especially in h-BN for 2D electronics and c-BN as an early-stage UWBG candidate.

Demand over the next three to five years will be driven primarily by R&D wafers, pilot device validation, defense and high-reliability programs, UVC and deep-UV applications, RF thermal management, quantum sensing, and radiation detection. Large-volume power device adoption will require additional breakthroughs in crystal diameter, defect density, doping control, wafer processing, thermal design, and long-term reliability. For Ga₂O₃, the main commercial question is whether its cost and voltage advantages can offset thermal and bipolar-doping limitations. For diamond, the question is whether wafer-scale, device-grade substrates can be produced at a cost acceptable to semiconductor customers. For AlN, the key issue is whether larger-diameter single-crystal substrates and templates can align with UVC, RF, and power device demand. For BN, the challenge is moving from research-grade material toward reproducible wafer-scale device platforms.

From a policy and industry-dynamics perspective, ultra-wide bandgap materials are increasingly strategic. U.S. defense and microelectronics programs are supporting domestic gallium oxide and large-area diamond substrates; Japan is supporting Ga₂O₃ power-device commercialization; China is accelerating domestic material platforms amid critical-material export controls and semiconductor supply-chain localization. These policy drivers will not automatically create mass markets, but they do shorten the validation path for domestic material suppliers and raise the strategic value of reliable substrate and epiwafer sources. Overall, the industry is likely to remain sample- and pilot-scale in 2025–2026, but if Ga₂O₃, AlN, and diamond overcome diameter, quality, and reliability bottlenecks, the market can plausibly transition from a few-hundred-million-dollar material niche into a billion-dollar-plus material platform in the early 2030s.

This report is a detailed and comprehensive analysis for global Fourth-generation Semiconductor Materials market. Both quantitative and qualitative analyses are

presented by manufacturers, by region & country, by Material and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Fourth-generation Semiconductor Materials market size and forecasts, in consumption value (\$ Million), sales quantity (K Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global Fourth-generation Semiconductor Materials market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global Fourth-generation Semiconductor Materials market size and forecasts, by Material and by Application, in consumption value (\$ Million), sales quantity (K Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global Fourth-generation Semiconductor Materials market shares of main players, shipments in revenue (\$ Million), sales quantity (K Pcs), and ASP (US\$/Pcs), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Fourth-generation Semiconductor Materials

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Fourth-generation Semiconductor Materials market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Novel Crystal Technology, Garen

Semi, Crystal IS (Asahi Kasei), HexaTech (Stanley Electric), Hangzhou Fujia, Beijing MIG, CETC, Orbray, Diamond Foundry Inc, Element Six (E6), etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Fourth-generation Semiconductor Materials market is split by Material and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Material, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Material

Single-crystal Diamond Wafers

Aluminium Nitride Single Crystal Substrate

?-Gallium Oxide(Ga₂O₃) Single Crystal Wafer

Market segment by Product Size

2 Inches

3 Inches

4 Inches

6 Inches

Other

Market segment by Crystal Fabrication Route

Melt Growth for Ga?O?

HVPE / MOCVD / MBE Epitaxy

PVT for AlN

HPHT Diamond

Other

Market segment by Application

RF Power, 5G & Satellites

Power Electronics

Cloud & AI Compute

Quantum Technologies

Others

Major players covered

Novel Crystal Technology

Garen Semi

Crystal IS (Asahi Kasei)

HexaTech (Stanley Electric)

Hangzhou Fujia

Beijing MIG

CETC

Orbray

Diamond Foundry Inc

Element Six (E6)

Ultratrend Technologies Inc

Gao Semi

Kyma Technologies

Nitride Crystals Inc

EDP Corporation

Advent Diamond

Coherent

Atecom Technology

Compound Semiconductor (Xiamen) Technology

Great Lakes Crystal Technologies (GLCT)

CSW Xiamen

Evolusia

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Fourth-generation Semiconductor Materials product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Fourth-generation Semiconductor Materials, with price, sales quantity, revenue, and global market share of Fourth-generation Semiconductor Materials from 2021 to 2026.

Chapter 3, the Fourth-generation Semiconductor Materials competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Fourth-generation Semiconductor Materials breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Material and by Application, with sales market share and growth rate by Material, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Fourth-generation Semiconductor Materials market forecast, by regions, by Material, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Fourth-generation Semiconductor Materials.

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