

Global Gallium Nitride (GaN) HEMT Epiwafers Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Gallium Nitride (GaN) HEMT Epiwafers market size is expected to reach \$ 1138 million by 2032, rising at a market growth of 10.1% CAGR during the forecast period (2026-2032).

A GaN HEMT epitaxial wafer is a device-ready wafer in which a multi-layer III-nitride heterostructure—most commonly an AlGaIn/GaN HEMT stack comprising nucleation, buffer, channel, and barrier layers—is grown on a substrate (Si, SiC, sapphire, or native/bulk GaN) and supplied for RF or power HEMT fabrication (or consumed internally by integrated manufacturers). In practice, product/process forms are commonly segmented by substrate route—GaN-on-Si (favoring larger diameters and CMOS compatibility, typically 150/200mm), GaN-on-SiC (favoring thermal performance for high-frequency/high-power RF, historically 100/150mm and moving upward), and more specialized GaN-on-sapphire and GaN-on-GaN options (including vertical-device directions). Technology differentiation is heavily centered on epitaxial growth and stress/defect engineering (MOCVD as the mainstream method, with MBE in selected cases): AlN nucleation, step-graded AlGaIn, superlattice and doped-buffer designs (e.g., carbon-doped buffers) are used to mitigate cracking and wafer bow, manage dislocations/traps, and deliver the uniformity, low contamination, breakdown behavior, and reliability required by RF and power HEMTs—especially on large-diameter wafers. The global market for GaN-on-SiC Wafer was estimated to be worth US\$ 271 million in 2025 and is forecast to a readjusted size of US\$ 378 million by 2032 with a CAGR of 5.0% during the forecast period 2026-2032.

The global market for GaN-on-Si Wafer was estimated to be worth US\$ 256 million in 2025 and is forecast to a readjusted size of US\$ 678 million by 2032 with a CAGR of 14.17% during the forecast period 2026-2032.

North American market for GaN HEMT Epitaxial Wafer was valued at \$ 170.26 million in 2025 and will reach \$ 279.53 million by 2032, at a CAGR of 7.32 % during the forecast

period of 2026 through 2032.

Europe market for GaN HEMT Epitaxial Wafer was valued at \$ 104.65 million in 2025 and will reach \$ 156.25 million by 2032, at a CAGR of 5.89 % during the forecast period of 2026 through 2032.

China Mainland market for GaN HEMT Epitaxial Wafer was valued at \$ 196.55 million in 2025 and will reach \$ 533.21 million by 2032, at a CAGR of 14.7 % during the forecast period of 2026 through 2032.

Japan market for GaN HEMT Epitaxial Wafer was valued at \$ 32.46 million in 2025 and will reach \$ 57.28 million by 2032, at a CAGR of 8.2% during the forecast period of 2026 through 2032.

The global key companies of GaN HEMT Epitaxial Wafer include Innoscience, Qorvo, Wolfspeed, Inc, NTT Advanced Technology (NTT-AT) , Enkris Semiconductor Inc, IQE, CETC 55, Soitec (EpiGaN) , DOWA Electronics Materials, Sumitomo Electric Device Innovations, CETC 13, Dynax Semiconductor, NXP, Sanan Optoelectronics and Renesas Electronics (Transphorm), etc. In 2025, the global six largest players hold a share approximately 55 % in terms of revenue.

The key players of GaN-on-SiC wafers include Qorvo, NXP, Wolfspeed, IQE, Soitec (EpiGaN), Sumitomo Electric Device Innovations, NTT Advanced Technology (NTT-AT), CETC 13, CETC 55 and Dynax Semiconductor, etc. In 2025, top ten players hold over 80% of global market.

The key players of GaN-on-Si wafers include Innoscience, IQE, NTT Advanced Technology (NTT-AT), DOWA Electronics Materials, and Enkris Semiconductor Inc, etc. In 2025, top four players hold over 70% of global market.

The global GaN HEMT epitaxial wafer industry has moved into an ?industrial scaling? phase with a clear platform bifurcation: GaN-on-Si is the volume engine for power GaN (cost-down via 200 mm/8-inch and a roadmap toward 300 mm), while GaN-on-SiC remains the premium platform for RF GaN where thermal performance and RF loss dominate total cost of ownership. Demand visibility is strengthening because power GaN device adoption is forecast to expand rapidly?we projects the power GaN device market reaching ~\$2.5 B by 2032, which translates into much higher wafer-start requirements for GaN-on-Si epi stacks. On the supply side, scaling is increasingly driven by large-diameter epitaxy capability and throughput investment: China-based InnoScience states it achieved mass production of 8-inch GaN-on-Si wafers, signaling that 200 mm GaN-on-Si is now industrial rather than experimental. In parallel, Europe?s merchant (open) ecosystem is scaling RF-grade epi, for example SweGaN?s facility planning references up to 40,000 (100/150 mm) GaN-on-SiC epiwafers per year as a high-volume target, reflecting a push to industrialize 150 mm GaN-on-SiC supply beyond pilot volumes. A second structural trend is the rise of engineered substrates to improve manufacturability and enable thicker/higher-voltage stacks at larger diameters;

Shin-Etsu Chemical explicitly confirms it has sold 150 mm and 200 mm QST substrates and GaN-on-QST epitaxial substrates, and is developing 300 mm QST, indicating real commercial pull for alternative platforms aimed at power devices.

Looking forward, growth is driven by system-level electrification and efficiency (fast chargers moving up in power, data-center/telecom power density requirements, and industrial power conversion) plus sustained RF infrastructure/defense/satcom demand that keeps GaN-on-SiC a high-value lane. Standardization is also lowering adoption friction while raising the bar for epi/device robustness: JEDEC's JEP180 establishes a common approach for switching-reliability evaluation of GaN power devices in power-conversion conditions, reinforcing the industry shift from "DC parametrics" to application-relevant stress validation. Policy is increasingly a first-order variable because GaN supply chains are strategic and capex-intensive: the U.S. CHIPS and Science Act provides \$52.7B over five years for semiconductor manufacturing/research programs, supporting onshore capacity and critical supply-chain investments. The EU's Chips Act similarly targets resilience and explicitly aims to double Europe's global semiconductor market share to 20% by 2030, improving the environment for compound-semiconductor pilot lines and industrialization. China's 14th Five-Year Plan also explicitly prioritizes developing silicon carbide, gallium nitride, and other wide-bandgap semiconductors, underpinning continued capacity buildout and localization efforts. This report studies the global Gallium Nitride (GaN) HEMT Epiwafers production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Gallium Nitride (GaN) HEMT Epiwafers and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Gallium Nitride (GaN) HEMT Epiwafers that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Gallium Nitride (GaN) HEMT Epiwafers total production and demand, 2021-2032, (K Pcs)

Global Gallium Nitride (GaN) HEMT Epiwafers total production value, 2021-2032, (USD Million)

Global Gallium Nitride (GaN) HEMT Epiwafers production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs), (based on production site)

Global Gallium Nitride (GaN) HEMT Epiwafers consumption by region & country, CAGR, 2021-2032 & (K Pcs)

U.S. VS China: Gallium Nitride (GaN) HEMT Epiwafers domestic production, consumption, key domestic manufacturers and share

Global Gallium Nitride (GaN) HEMT Epiwafers production by manufacturer, production,

price, value and market share 2021-2026, (USD Million) & (K Pcs)

Global Gallium Nitride (GaN) HEMT Epiwafers production by Substrate Type, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

Global Gallium Nitride (GaN) HEMT Epiwafers production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

This report profiles key players in the global Gallium Nitride (GaN) HEMT Epiwafers market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Innoscience, Qorvo, Wolfspeed, Inc, NTT Advanced Technology (NTT-AT), Enkris Semiconductor Inc, IQE, CETC 55, Soitec (EpiGaN), DOWA Electronics Materials, Sumitomo Electric Device Innovations, etc. This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Gallium Nitride (GaN) HEMT Epiwafers market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Pcs) and average price (US\$/Pcs) by manufacturer, by Substrate Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Gallium Nitride (GaN) HEMT Epiwafers Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Gallium Nitride (GaN) HEMT Epiwafers Market, Segmentation by Substrate Type:

GaN-on-SiC Wafer

GaN-on-Si Wafer

GaN-on-Sapphire Wafer

Others

Global Gallium Nitride (GaN) HEMT Epiwafers Market, Segmentation by Business Model:

Open Epiwafer

Captive Epiwafer

Global Gallium Nitride (GaN) HEMT Epiwafers Market, Segmentation by Market:

Mobile and Consumer

Telecom and Infrastructure

Defense & Aerospace

Industrial

Automotive & Mobility

Others

Global Gallium Nitride (GaN) HEMT Epiwafers Market, Segmentation by Application:

GaN HEMT RF Devices

GaN HEMT Power Devices

Companies Profiled:

Innoscience

Qorvo

Wolfspeed, Inc

NTT Advanced Technology (NTT-AT)

Enkris Semiconductor Inc

IQE

CETC 55

Soitec (EpiGaN)

DOWA Electronics Materials

Sumitomo Electric Device Innovations

CETC 13

Dynax Semiconductor

NXP

Sanan Optoelectronics

Renesas Electronics (Transphorm)

Northrop Grumman

IVWorks

Episil-Precision Inc

China Resources Microelectronics

Suzhou Nanowin Science and Technology

MACOM

CorEnergy

Shaanxi Yuteng Electronic Technology

Shin-Etsu Chemical

SweGaN

Centrasky Crystal Science (Ningbo)

Sino Nitride Semiconductor

Qingdao Cohenius Microelectronics

GaNcool

BTOZ

Epistar Corp.

GaN Asia Semiconductor

A-PRO Semicon

Key Questions Answered:

1. How big is the global Gallium Nitride (GaN) HEMT Epiwafers market?
2. What is the demand of the global Gallium Nitride (GaN) HEMT Epiwafers market?
3. What is the year over year growth of the global Gallium Nitride (GaN) HEMT Epiwafers market?
4. What is the production and production value of the global Gallium Nitride (GaN)

HEMT Epiwafers market?

5. Who are the key producers in the global Gallium Nitride (GaN) HEMT Epiwafers market?

6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Gallium Nitride (GaN) HEMT Epiwafers Introduction
- 1.2 World Gallium Nitride (GaN) HEMT Epiwafers Supply & Forecast
 - 1.2.1 World Gallium Nitride (GaN) HEMT Epiwafers Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Gallium Nitride (GaN) HEMT Epiwafers Production (2021-2032)
 - 1.2.3 World Gallium Nitride (GaN) HEMT Epiwafers Pricing Trends (2021-2032)
- 1.3 World Gallium Nitride (GaN) HEMT Epiwafers Production by Region (Based on Production Site)
 - 1.3.1 World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Region (2021-2032)
 - 1.3.2 World Gallium Nitride (GaN) HEMT Epiwafers Production by Region (2021-2032)
 - 1.3.3 World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Region (2021-2032)
 - 1.3.4 North America Gallium Nitride (GaN) HEMT Epiwafers Production (2021-2032)
 - 1.3.5 Europe Gallium Nitride (GaN) HEMT Epiwafers Production (2021-2032)
 - 1.3.6 China Gallium Nitride (GaN) HEMT Epiwafers Production (2021-2032)
 - 1.3.7 Japan Gallium Nitride (GaN) HEMT Epiwafers Production (2021-2032)
 - 1.3.8 South Korea Gallium Nitride (GaN) HEMT Epiwafers Production (2021-2032)
 - 1.3.9 China Taiwan Gallium Nitride (GaN) HEMT Epiwafers Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Gallium Nitride (GaN) HEMT Epiwafers Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Gallium Nitride (GaN) HEMT Epiwafers Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Gallium Nitride (GaN) HEMT Epiwafers Demand (2021-2032)
- 2.2 World Gallium Nitride (GaN) HEMT Epiwafers Consumption by Region
 - 2.2.1 World Gallium Nitride (GaN) HEMT Epiwafers Consumption by Region (2021-2026)
 - 2.2.2 World Gallium Nitride (GaN) HEMT Epiwafers Consumption Forecast by Region (2027-2032)
- 2.3 United States Gallium Nitride (GaN) HEMT Epiwafers Consumption (2021-2032)
- 2.4 China Gallium Nitride (GaN) HEMT Epiwafers Consumption (2021-2032)
- 2.5 Europe Gallium Nitride (GaN) HEMT Epiwafers Consumption (2021-2032)

- 2.6 Japan Gallium Nitride (GaN) HEMT Epiwafers Consumption (2021-2032)
- 2.7 South Korea Gallium Nitride (GaN) HEMT Epiwafers Consumption (2021-2032)
- 2.8 ASEAN Gallium Nitride (GaN) HEMT Epiwafers Consumption (2021-2032)
- 2.9 India Gallium Nitride (GaN) HEMT Epiwafers Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Manufacturer (2021-2026)
- 3.2 World Gallium Nitride (GaN) HEMT Epiwafers Production by Manufacturer (2021-2026)
- 3.3 World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Manufacturer (2021-2026)
- 3.4 Gallium Nitride (GaN) HEMT Epiwafers Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Gallium Nitride (GaN) HEMT Epiwafers Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Gallium Nitride (GaN) HEMT Epiwafers in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Gallium Nitride (GaN) HEMT Epiwafers in 2025
- 3.6 Gallium Nitride (GaN) HEMT Epiwafers Market: Overall Company Footprint Analysis
 - 3.6.1 Gallium Nitride (GaN) HEMT Epiwafers Market: Region Footprint
 - 3.6.2 Gallium Nitride (GaN) HEMT Epiwafers Market: Company Product Type Footprint
 - 3.6.3 Gallium Nitride (GaN) HEMT Epiwafers Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Gallium Nitride (GaN) HEMT Epiwafers Production Value Comparison
 - 4.1.1 United States VS China: Gallium Nitride (GaN) HEMT Epiwafers Production

Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Gallium Nitride (GaN) HEMT Epiwafers Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Gallium Nitride (GaN) HEMT Epiwafers Production Comparison

4.2.1 United States VS China: Gallium Nitride (GaN) HEMT Epiwafers Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Gallium Nitride (GaN) HEMT Epiwafers Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Gallium Nitride (GaN) HEMT Epiwafers Consumption Comparison

4.3.1 United States VS China: Gallium Nitride (GaN) HEMT Epiwafers Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Gallium Nitride (GaN) HEMT Epiwafers Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Gallium Nitride (GaN) HEMT Epiwafers Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Gallium Nitride (GaN) HEMT Epiwafers Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production Value (2021-2026)

4.4.3 United States Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production (2021-2026)

4.5 China Based Gallium Nitride (GaN) HEMT Epiwafers Manufacturers and Market Share

4.5.1 China Based Gallium Nitride (GaN) HEMT Epiwafers Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production Value (2021-2026)

4.5.3 China Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production (2021-2026)

4.6 Rest of World Based Gallium Nitride (GaN) HEMT Epiwafers Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Gallium Nitride (GaN) HEMT Epiwafers Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production (2021-2026)

5 MARKET ANALYSIS BY SUBSTRATE TYPE

5.1 World Gallium Nitride (GaN) HEMT Epiwafers Market Size Overview by Substrate Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Substrate Type

5.2.1 GaN-on-SiC Wafer

5.2.2 GaN-on-Si Wafer

5.2.3 GaN-on-Sapphire Wafer

5.2.4 Others

5.3 Market Segment by Substrate Type

5.3.1 World Gallium Nitride (GaN) HEMT Epiwafers Production by Substrate Type (2021-2032)

5.3.2 World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Substrate Type (2021-2032)

5.3.3 World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Substrate Type (2021-2032)

6 MARKET ANALYSIS BY BUSINESS MODEL

6.1 World Gallium Nitride (GaN) HEMT Epiwafers Market Size Overview by Business Model: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Business Model

6.2.1 Open Epiwafer

6.2.2 Captive Epiwafer

6.3 Market Segment by Business Model

6.3.1 World Gallium Nitride (GaN) HEMT Epiwafers Production by Business Model (2021-2032)

6.3.2 World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Business Model (2021-2032)

6.3.3 World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Business Model (2021-2032)

7 MARKET ANALYSIS BY MARKET

7.1 World Gallium Nitride (GaN) HEMT Epiwafers Market Size Overview by Market: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Market

7.2.1 Mobile and Consumer

7.2.2 Telecom and Infrastructure

7.2.3 Defense & Aerospace

7.2.4 Industrial

7.2.5 Automotive & Mobility

7.2.6 Others

7.3 Market Segment by Market

7.3.1 World Gallium Nitride (GaN) HEMT Epiwafers Production by Market (2021-2032)

7.3.2 World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Market (2021-2032)

7.3.3 World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Market (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Gallium Nitride (GaN) HEMT Epiwafers Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 GaN HEMT RF Devices

8.2.2 GaN HEMT Power Devices

8.3 Market Segment by Application

8.3.1 World Gallium Nitride (GaN) HEMT Epiwafers Production by Application (2021-2032)

8.3.2 World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Application (2021-2032)

8.3.3 World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Innoscience

9.1.1 Innoscience Details

9.1.2 Innoscience Major Business

9.1.3 Innoscience Gallium Nitride (GaN) HEMT Epiwafers Product and Services

9.1.4 Innoscience Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Innoscience Recent Developments/Updates

9.1.6 Innoscience Competitive Strengths & Weaknesses

9.2 Qorvo

9.2.1 Qorvo Details

- 9.2.2 Qorvo Major Business
- 9.2.3 Qorvo Gallium Nitride (GaN) HEMT Epiwafers Product and Services
- 9.2.4 Qorvo Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.2.5 Qorvo Recent Developments/Updates
- 9.2.6 Qorvo Competitive Strengths & Weaknesses
- 9.3 Wolfspeed, Inc
 - 9.3.1 Wolfspeed, Inc Details
 - 9.3.2 Wolfspeed, Inc Major Business
 - 9.3.3 Wolfspeed, Inc Gallium Nitride (GaN) HEMT Epiwafers Product and Services
 - 9.3.4 Wolfspeed, Inc Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.3.5 Wolfspeed, Inc Recent Developments/Updates
 - 9.3.6 Wolfspeed, Inc Competitive Strengths & Weaknesses
- 9.4 NTT Advanced Technology (NTT-AT)
 - 9.4.1 NTT Advanced Technology (NTT-AT) Details
 - 9.4.2 NTT Advanced Technology (NTT-AT) Major Business
 - 9.4.3 NTT Advanced Technology (NTT-AT) Gallium Nitride (GaN) HEMT Epiwafers Product and Services
 - 9.4.4 NTT Advanced Technology (NTT-AT) Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 NTT Advanced Technology (NTT-AT) Recent Developments/Updates
 - 9.4.6 NTT Advanced Technology (NTT-AT) Competitive Strengths & Weaknesses
- 9.5 Enkris Semiconductor Inc
 - 9.5.1 Enkris Semiconductor Inc Details
 - 9.5.2 Enkris Semiconductor Inc Major Business
 - 9.5.3 Enkris Semiconductor Inc Gallium Nitride (GaN) HEMT Epiwafers Product and Services
 - 9.5.4 Enkris Semiconductor Inc Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Enkris Semiconductor Inc Recent Developments/Updates
 - 9.5.6 Enkris Semiconductor Inc Competitive Strengths & Weaknesses
- 9.6 IQE
 - 9.6.1 IQE Details
 - 9.6.2 IQE Major Business
 - 9.6.3 IQE Gallium Nitride (GaN) HEMT Epiwafers Product and Services
 - 9.6.4 IQE Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.6.5 IQE Recent Developments/Updates

9.6.6 IQE Competitive Strengths & Weaknesses

9.7 CETC

9.7.1 CETC 55 Details

9.7.2 CETC 55 Major Business

9.7.3 CETC 55 Gallium Nitride (GaN) HEMT Epiwafers Product and Services

9.7.4 CETC 55 Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 CETC 55 Recent Developments/Updates

9.7.6 CETC 55 Competitive Strengths & Weaknesses

9.8 Soitec (EpiGaN)

9.8.1 Soitec (EpiGaN) Details

9.8.2 Soitec (EpiGaN) Major Business

9.8.3 Soitec (EpiGaN) Gallium Nitride (GaN) HEMT Epiwafers Product and Services

9.8.4 Soitec (EpiGaN) Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Soitec (EpiGaN) Recent Developments/Updates

9.8.6 Soitec (EpiGaN) Competitive Strengths & Weaknesses

9.9 DOWA Electronics Materials

9.9.1 DOWA Electronics Materials Details

9.9.2 DOWA Electronics Materials Major Business

9.9.3 DOWA Electronics Materials Gallium Nitride (GaN) HEMT Epiwafers Product and Services

9.9.4 DOWA Electronics Materials Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 DOWA Electronics Materials Recent Developments/Updates

9.9.6 DOWA Electronics Materials Competitive Strengths & Weaknesses

9.10 Sumitomo Electric Device Innovations

9.10.1 Sumitomo Electric Device Innovations Details

9.10.2 Sumitomo Electric Device Innovations Major Business

9.10.3 Sumitomo Electric Device Innovations Gallium Nitride (GaN) HEMT Epiwafers Product and Services

9.10.4 Sumitomo Electric Device Innovations Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 Sumitomo Electric Device Innovations Recent Developments/Updates

9.10.6 Sumitomo Electric Device Innovations Competitive Strengths & Weaknesses

9.11 CETC

9.11.1 CETC 13 Details

9.11.2 CETC 13 Major Business

9.11.3 CETC 13 Gallium Nitride (GaN) HEMT Epiwafers Product and Services

- 9.11.4 CETC 13 Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.11.5 CETC 13 Recent Developments/Updates
- 9.11.6 CETC 13 Competitive Strengths & Weaknesses
- 9.12 Dynax Semiconductor
 - 9.12.1 Dynax Semiconductor Details
 - 9.12.2 Dynax Semiconductor Major Business
 - 9.12.3 Dynax Semiconductor Gallium Nitride (GaN) HEMT Epiwafers Product and Services
 - 9.12.4 Dynax Semiconductor Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Dynax Semiconductor Recent Developments/Updates
 - 9.12.6 Dynax Semiconductor Competitive Strengths & Weaknesses
- 9.13 NXP
 - 9.13.1 NXP Details
 - 9.13.2 NXP Major Business
 - 9.13.3 NXP Gallium Nitride (GaN) HEMT Epiwafers Product and Services
 - 9.13.4 NXP Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 NXP Recent Developments/Updates
 - 9.13.6 NXP Competitive Strengths & Weaknesses
- 9.14 Sanan Optoelectronics
 - 9.14.1 Sanan Optoelectronics Details
 - 9.14.2 Sanan Optoelectronics Major Business
 - 9.14.3 Sanan Optoelectronics Gallium Nitride (GaN) HEMT Epiwafers Product and Services
 - 9.14.4 Sanan Optoelectronics Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Sanan Optoelectronics Recent Developments/Updates
 - 9.14.6 Sanan Optoelectronics Competitive Strengths & Weaknesses
- 9.15 Renesas Electronics (Transphorm)
 - 9.15.1 Renesas Electronics (Transphorm) Details
 - 9.15.2 Renesas Electronics (Transphorm) Major Business
 - 9.15.3 Renesas Electronics (Transphorm) Gallium Nitride (GaN) HEMT Epiwafers Product and Services
 - 9.15.4 Renesas Electronics (Transphorm) Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 Renesas Electronics (Transphorm) Recent Developments/Updates
 - 9.15.6 Renesas Electronics (Transphorm) Competitive Strengths & Weaknesses

9.16 Northrop Grumman

9.16.1 Northrop Grumman Details

9.16.2 Northrop Grumman Major Business

9.16.3 Northrop Grumman Gallium Nitride (GaN) HEMT Epiwafers Product and Services

9.16.4 Northrop Grumman Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.16.5 Northrop Grumman Recent Developments/Updates

9.16.6 Northrop Grumman Competitive Strengths & Weaknesses

9.17 IVWorks

9.17.1 IVWorks Details

9.17.2 IVWorks Major Business

9.17.3 IVWorks Gallium Nitride (GaN) HEMT Epiwafers Product and Services

9.17.4 IVWorks Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.17.5 IVWorks Recent Developments/Updates

9.17.6 IVWorks Competitive Strengths & Weaknesses

9.18 Episil-Precision Inc

9.18.1 Episil-Precision Inc Details

9.18.2 Episil-Precision Inc Major Business

9.18.3 Episil-Precision Inc Gallium Nitride (GaN) HEMT Epiwafers Product and Services

9.18.4 Episil-Precision Inc Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.18.5 Episil-Precision Inc Recent Developments/Updates

9.18.6 Episil-Precision Inc Competitive Strengths & Weaknesses

9.19 China Resources Microelectronics

9.19.1 China Resources Microelectronics Details

9.19.2 China Resources Microelectronics Major Business

9.19.3 China Resources Microelectronics Gallium Nitride (GaN) HEMT Epiwafers Product and Services

9.19.4 China Resources Microelectronics Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.19.5 China Resources Microelectronics Recent Developments/Updates

9.19.6 China Resources Microelectronics Competitive Strengths & Weaknesses

9.20 Suzhou Nanowin Science and Technology

9.20.1 Suzhou Nanowin Science and Technology Details

9.20.2 Suzhou Nanowin Science and Technology Major Business

9.20.3 Suzhou Nanowin Science and Technology Gallium Nitride (GaN) HEMT

Epiwafers Product and Services

9.20.4 Suzhou Nanowin Science and Technology Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.20.5 Suzhou Nanowin Science and Technology Recent Developments/Updates

9.20.6 Suzhou Nanowin Science and Technology Competitive Strengths & Weaknesses

9.21 MACOM

9.21.1 MACOM Details

9.21.2 MACOM Major Business

9.21.3 MACOM Gallium Nitride (GaN) HEMT Epiwafers Product and Services

9.21.4 MACOM Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.21.5 MACOM Recent Developments/Updates

9.21.6 MACOM Competitive Strengths & Weaknesses

9.22 CorEnergy

9.22.1 CorEnergy Details

9.22.2 CorEnergy Major Business

9.22.3 CorEnergy Gallium Nitride (GaN) HEMT Epiwafers Product and Services

9.22.4 CorEnergy Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.22.5 CorEnergy Recent Developments/Updates

9.22.6 CorEnergy Competitive Strengths & Weaknesses

9.23 Shaanxi Yuteng Electronic Technology

9.23.1 Shaanxi Yuteng Electronic Technology Details

9.23.2 Shaanxi Yuteng Electronic Technology Major Business

9.23.3 Shaanxi Yuteng Electronic Technology Gallium Nitride (GaN) HEMT Epiwafers Product and Services

9.23.4 Shaanxi Yuteng Electronic Technology Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.23.5 Shaanxi Yuteng Electronic Technology Recent Developments/Updates

9.23.6 Shaanxi Yuteng Electronic Technology Competitive Strengths & Weaknesses

9.24 Shin-Etsu Chemical

9.24.1 Shin-Etsu Chemical Details

9.24.2 Shin-Etsu Chemical Major Business

9.24.3 Shin-Etsu Chemical Gallium Nitride (GaN) HEMT Epiwafers Product and Services

9.24.4 Shin-Etsu Chemical Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.24.5 Shin-Etsu Chemical Recent Developments/Updates

- 9.24.6 Shin-Etsu Chemical Competitive Strengths & Weaknesses
- 9.25 SweGaN
 - 9.25.1 SweGaN Details
 - 9.25.2 SweGaN Major Business
 - 9.25.3 SweGaN Gallium Nitride (GaN) HEMT Epiwafers Product and Services
 - 9.25.4 SweGaN Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.25.5 SweGaN Recent Developments/Updates
 - 9.25.6 SweGaN Competitive Strengths & Weaknesses
- 9.26 Centrasky Crystal Science (Ningbo)
 - 9.26.1 Centrasky Crystal Science (Ningbo) Details
 - 9.26.2 Centrasky Crystal Science (Ningbo) Major Business
 - 9.26.3 Centrasky Crystal Science (Ningbo) Gallium Nitride (GaN) HEMT Epiwafers Product and Services
 - 9.26.4 Centrasky Crystal Science (Ningbo) Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.26.5 Centrasky Crystal Science (Ningbo) Recent Developments/Updates
 - 9.26.6 Centrasky Crystal Science (Ningbo) Competitive Strengths & Weaknesses
- 9.27 Sino Nitride Semiconductor
 - 9.27.1 Sino Nitride Semiconductor Details
 - 9.27.2 Sino Nitride Semiconductor Major Business
 - 9.27.3 Sino Nitride Semiconductor Gallium Nitride (GaN) HEMT Epiwafers Product and Services
 - 9.27.4 Sino Nitride Semiconductor Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.27.5 Sino Nitride Semiconductor Recent Developments/Updates
 - 9.27.6 Sino Nitride Semiconductor Competitive Strengths & Weaknesses
- 9.28 Qingdao Cohenius Microelectronics
 - 9.28.1 Qingdao Cohenius Microelectronics Details
 - 9.28.2 Qingdao Cohenius Microelectronics Major Business
 - 9.28.3 Qingdao Cohenius Microelectronics Gallium Nitride (GaN) HEMT Epiwafers Product and Services
 - 9.28.4 Qingdao Cohenius Microelectronics Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.28.5 Qingdao Cohenius Microelectronics Recent Developments/Updates
 - 9.28.6 Qingdao Cohenius Microelectronics Competitive Strengths & Weaknesses
- 9.29 GaNcool
 - 9.29.1 GaNcool Details
 - 9.29.2 GaNcool Major Business

- 9.29.3 GaNcool Gallium Nitride (GaN) HEMT Epiwafers Product and Services
- 9.29.4 GaNcool Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.29.5 GaNcool Recent Developments/Updates
- 9.29.6 GaNcool Competitive Strengths & Weaknesses
- 9.30 BTOZ
 - 9.30.1 BTOZ Details
 - 9.30.2 BTOZ Major Business
 - 9.30.3 BTOZ Gallium Nitride (GaN) HEMT Epiwafers Product and Services
 - 9.30.4 BTOZ Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.30.5 BTOZ Recent Developments/Updates
 - 9.30.6 BTOZ Competitive Strengths & Weaknesses
- 9.31 Epistar Corp.
 - 9.31.1 Epistar Corp. Details
 - 9.31.2 Epistar Corp. Major Business
 - 9.31.3 Epistar Corp. Gallium Nitride (GaN) HEMT Epiwafers Product and Services
 - 9.31.4 Epistar Corp. Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.31.5 Epistar Corp. Recent Developments/Updates
 - 9.31.6 Epistar Corp. Competitive Strengths & Weaknesses
- 9.32 GaN Asia Semiconductor
 - 9.32.1 GaN Asia Semiconductor Details
 - 9.32.2 GaN Asia Semiconductor Major Business
 - 9.32.3 GaN Asia Semiconductor Gallium Nitride (GaN) HEMT Epiwafers Product and Services
 - 9.32.4 GaN Asia Semiconductor Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.32.5 GaN Asia Semiconductor Recent Developments/Updates
 - 9.32.6 GaN Asia Semiconductor Competitive Strengths & Weaknesses
- 9.33 A-PRO Semicon
 - 9.33.1 A-PRO Semicon Details
 - 9.33.2 A-PRO Semicon Major Business
 - 9.33.3 A-PRO Semicon Gallium Nitride (GaN) HEMT Epiwafers Product and Services
 - 9.33.4 A-PRO Semicon Gallium Nitride (GaN) HEMT Epiwafers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.33.5 A-PRO Semicon Recent Developments/Updates
 - 9.33.6 A-PRO Semicon Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Gallium Nitride (GaN) HEMT Epiwafers Industry Chain

10.2 Gallium Nitride (GaN) HEMT Epiwafers Upstream Analysis

10.2.1 Gallium Nitride (GaN) HEMT Epiwafers Core Raw Materials

10.2.2 Main Manufacturers of Gallium Nitride (GaN) HEMT Epiwafers Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Gallium Nitride (GaN) HEMT Epiwafers Production Mode

10.6 Gallium Nitride (GaN) HEMT Epiwafers Procurement Model

10.7 Gallium Nitride (GaN) HEMT Epiwafers Industry Sales Model and Sales Channels

10.7.1 Gallium Nitride (GaN) HEMT Epiwafers Sales Model

10.7.2 Gallium Nitride (GaN) HEMT Epiwafers Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Region (2021-2026) & (USD Million)

Table 3. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Region (2027-2032) & (USD Million)

Table 4. World Gallium Nitride (GaN) HEMT Epiwafers Production Value Market Share by Region (2021-2026)

Table 5. World Gallium Nitride (GaN) HEMT Epiwafers Production Value Market Share by Region (2027-2032)

Table 6. World Gallium Nitride (GaN) HEMT Epiwafers Production by Region (2021-2026) & (K Pcs)

Table 7. World Gallium Nitride (GaN) HEMT Epiwafers Production by Region (2027-2032) & (K Pcs)

Table 8. World Gallium Nitride (GaN) HEMT Epiwafers Production Market Share by Region (2021-2026)

Table 9. World Gallium Nitride (GaN) HEMT Epiwafers Production Market Share by Region (2027-2032)

Table 10. World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Region (2021-2026) & (US\$/Pcs)

Table 11. World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Region (2027-2032) & (US\$/Pcs)

Table 12. Gallium Nitride (GaN) HEMT Epiwafers Major Market Trends

Table 13. World Gallium Nitride (GaN) HEMT Epiwafers Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Pcs)

Table 14. World Gallium Nitride (GaN) HEMT Epiwafers Consumption by Region (2021-2026) & (K Pcs)

Table 15. World Gallium Nitride (GaN) HEMT Epiwafers Consumption Forecast by Region (2027-2032) & (K Pcs)

Table 16. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Gallium Nitride (GaN) HEMT Epiwafers Producers in 2025

Table 18. World Gallium Nitride (GaN) HEMT Epiwafers Production by Manufacturer (2021-2026) & (K Pcs)

Table 19. Production Market Share of Key Gallium Nitride (GaN) HEMT Epiwafers Producers in 2025

Table 20. World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Manufacturer (2021-2026) & (US\$/Pcs)

Table 21. Global Gallium Nitride (GaN) HEMT Epiwafers Company Evaluation Quadrant

Table 22. World Gallium Nitride (GaN) HEMT Epiwafers Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Gallium Nitride (GaN) HEMT Epiwafers Production Site of Key Manufacturer

Table 24. Gallium Nitride (GaN) HEMT Epiwafers Market: Company Product Type Footprint

Table 25. Gallium Nitride (GaN) HEMT Epiwafers Market: Company Product Application Footprint

Table 26. Gallium Nitride (GaN) HEMT Epiwafers Competitive Factors

Table 27. Gallium Nitride (GaN) HEMT Epiwafers New Entrant and Capacity Expansion Plans

Table 28. Gallium Nitride (GaN) HEMT Epiwafers Mergers & Acquisitions Activity

Table 29. United States VS China Gallium Nitride (GaN) HEMT Epiwafers Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Gallium Nitride (GaN) HEMT Epiwafers Production Comparison, (2021 & 2025 & 2032) & (K Pcs)

Table 31. United States VS China Gallium Nitride (GaN) HEMT Epiwafers Consumption Comparison, (2021 & 2025 & 2032) & (K Pcs)

Table 32. United States Based Gallium Nitride (GaN) HEMT Epiwafers Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production (2021-2026) & (K Pcs)

Table 36. United States Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production Market Share (2021-2026)

Table 37. China Based Gallium Nitride (GaN) HEMT Epiwafers Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production, (2021-2026) & (K Pcs)

Table 41. China Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production Market Share (2021-2026)

Table 42. Rest of World Based Gallium Nitride (GaN) HEMT Epiwafers Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production, (2021-2026) & (K Pcs)

Table 46. Rest of World Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production Market Share (2021-2026)

Table 47. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Substrate Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Gallium Nitride (GaN) HEMT Epiwafers Production by Substrate Type (2021-2026) & (K Pcs)

Table 49. World Gallium Nitride (GaN) HEMT Epiwafers Production by Substrate Type (2027-2032) & (K Pcs)

Table 50. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Substrate Type (2021-2026) & (USD Million)

Table 51. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Substrate Type (2027-2032) & (USD Million)

Table 52. World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Substrate Type (2021-2026) & (US\$/Pcs)

Table 53. World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Substrate Type (2027-2032) & (US\$/Pcs)

Table 54. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Business Model, (USD Million), 2021 & 2025 & 2032

Table 55. World Gallium Nitride (GaN) HEMT Epiwafers Production by Business Model (2021-2026) & (K Pcs)

Table 56. World Gallium Nitride (GaN) HEMT Epiwafers Production by Business Model (2027-2032) & (K Pcs)

Table 57. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Business Model (2021-2026) & (USD Million)

Table 58. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Business Model (2027-2032) & (USD Million)

Table 59. World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Business

Model (2021-2026) & (US\$/Pcs)

Table 60. World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Business Model (2027-2032) & (US\$/Pcs)

Table 61. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Market, (USD Million), 2021 & 2025 & 2032

Table 62. World Gallium Nitride (GaN) HEMT Epiwafers Production by Market (2021-2026) & (K Pcs)

Table 63. World Gallium Nitride (GaN) HEMT Epiwafers Production by Market (2027-2032) & (K Pcs)

Table 64. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Market (2021-2026) & (USD Million)

Table 65. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Market (2027-2032) & (USD Million)

Table 66. World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Market (2021-2026) & (US\$/Pcs)

Table 67. World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Market (2027-2032) & (US\$/Pcs)

Table 68. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Gallium Nitride (GaN) HEMT Epiwafers Production by Application (2021-2026) & (K Pcs)

Table 70. World Gallium Nitride (GaN) HEMT Epiwafers Production by Application (2027-2032) & (K Pcs)

Table 71. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Application (2021-2026) & (USD Million)

Table 72. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Application (2027-2032) & (USD Million)

Table 73. World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Application (2021-2026) & (US\$/Pcs)

Table 74. World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Application (2027-2032) & (US\$/Pcs)

Table 75. Innoscience Basic Information, Manufacturing Base and Competitors

Table 76. Innoscience Major Business

Table 77. Innoscience Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 78. Innoscience Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Innoscience Recent Developments/Updates

Table 80. Innoscience Competitive Strengths & Weaknesses

Table 81. Qorvo Basic Information, Manufacturing Base and Competitors

Table 82. Qorvo Major Business

Table 83. Qorvo Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 84. Qorvo Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Qorvo Recent Developments/Updates

Table 86. Qorvo Competitive Strengths & Weaknesses

Table 87. Wolfspeed, Inc Basic Information, Manufacturing Base and Competitors

Table 88. Wolfspeed, Inc Major Business

Table 89. Wolfspeed, Inc Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 90. Wolfspeed, Inc Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Wolfspeed, Inc Recent Developments/Updates

Table 92. Wolfspeed, Inc Competitive Strengths & Weaknesses

Table 93. NTT Advanced Technology (NTT-AT) Basic Information, Manufacturing Base and Competitors

Table 94. NTT Advanced Technology (NTT-AT) Major Business

Table 95. NTT Advanced Technology (NTT-AT) Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 96. NTT Advanced Technology (NTT-AT) Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. NTT Advanced Technology (NTT-AT) Recent Developments/Updates

Table 98. NTT Advanced Technology (NTT-AT) Competitive Strengths & Weaknesses

Table 99. Enkris Semiconductor Inc Basic Information, Manufacturing Base and Competitors

Table 100. Enkris Semiconductor Inc Major Business

Table 101. Enkris Semiconductor Inc Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 102. Enkris Semiconductor Inc Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Enkris Semiconductor Inc Recent Developments/Updates

Table 104. Enkris Semiconductor Inc Competitive Strengths & Weaknesses

Table 105. IQE Basic Information, Manufacturing Base and Competitors

Table 106. IQE Major Business

Table 107. IQE Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 108. IQE Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. IQE Recent Developments/Updates

Table 110. IQE Competitive Strengths & Weaknesses

Table 111. CETC 55 Basic Information, Manufacturing Base and Competitors

Table 112. CETC 55 Major Business

Table 113. CETC 55 Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 114. CETC 55 Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. CETC 55 Recent Developments/Updates

Table 116. CETC 55 Competitive Strengths & Weaknesses

Table 117. Soitec (EpiGaN) Basic Information, Manufacturing Base and Competitors

Table 118. Soitec (EpiGaN) Major Business

Table 119. Soitec (EpiGaN) Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 120. Soitec (EpiGaN) Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Soitec (EpiGaN) Recent Developments/Updates

Table 122. Soitec (EpiGaN) Competitive Strengths & Weaknesses

Table 123. DOWA Electronics Materials Basic Information, Manufacturing Base and Competitors

Table 124. DOWA Electronics Materials Major Business

Table 125. DOWA Electronics Materials Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 126. DOWA Electronics Materials Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. DOWA Electronics Materials Recent Developments/Updates

Table 128. DOWA Electronics Materials Competitive Strengths & Weaknesses

Table 129. Sumitomo Electric Device Innovations Basic Information, Manufacturing Base and Competitors

Table 130. Sumitomo Electric Device Innovations Major Business

Table 131. Sumitomo Electric Device Innovations Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 132. Sumitomo Electric Device Innovations Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross

Margin and Market Share (2021-2026)

Table 133. Sumitomo Electric Device Innovations Recent Developments/Updates

Table 134. Sumitomo Electric Device Innovations Competitive Strengths & Weaknesses

Table 135. CETC 13 Basic Information, Manufacturing Base and Competitors

Table 136. CETC 13 Major Business

Table 137. CETC 13 Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 138. CETC 13 Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. CETC 13 Recent Developments/Updates

Table 140. CETC 13 Competitive Strengths & Weaknesses

Table 141. Dynax Semiconductor Basic Information, Manufacturing Base and Competitors

Table 142. Dynax Semiconductor Major Business

Table 143. Dynax Semiconductor Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 144. Dynax Semiconductor Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Dynax Semiconductor Recent Developments/Updates

Table 146. Dynax Semiconductor Competitive Strengths & Weaknesses

Table 147. NXP Basic Information, Manufacturing Base and Competitors

Table 148. NXP Major Business

Table 149. NXP Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 150. NXP Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. NXP Recent Developments/Updates

Table 152. NXP Competitive Strengths & Weaknesses

Table 153. Sanan Optoelectronics Basic Information, Manufacturing Base and Competitors

Table 154. Sanan Optoelectronics Major Business

Table 155. Sanan Optoelectronics Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 156. Sanan Optoelectronics Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Sanan Optoelectronics Recent Developments/Updates

Table 158. Sanan Optoelectronics Competitive Strengths & Weaknesses

Table 159. Renesas Electronics (Transphorm) Basic Information, Manufacturing Base and Competitors

Table 160. Renesas Electronics (Transphorm) Major Business

Table 161. Renesas Electronics (Transphorm) Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 162. Renesas Electronics (Transphorm) Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Renesas Electronics (Transphorm) Recent Developments/Updates

Table 164. Renesas Electronics (Transphorm) Competitive Strengths & Weaknesses

Table 165. Northrop Grumman Basic Information, Manufacturing Base and Competitors

Table 166. Northrop Grumman Major Business

Table 167. Northrop Grumman Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 168. Northrop Grumman Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. Northrop Grumman Recent Developments/Updates

Table 170. Northrop Grumman Competitive Strengths & Weaknesses

Table 171. IVWorks Basic Information, Manufacturing Base and Competitors

Table 172. IVWorks Major Business

Table 173. IVWorks Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 174. IVWorks Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 175. IVWorks Recent Developments/Updates

Table 176. IVWorks Competitive Strengths & Weaknesses

Table 177. Episil-Precision Inc Basic Information, Manufacturing Base and Competitors

Table 178. Episil-Precision Inc Major Business

Table 179. Episil-Precision Inc Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 180. Episil-Precision Inc Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 181. Episil-Precision Inc Recent Developments/Updates

Table 182. Episil-Precision Inc Competitive Strengths & Weaknesses

Table 183. China Resources Microelectronics Basic Information, Manufacturing Base and Competitors

Table 184. China Resources Microelectronics Major Business

Table 185. China Resources Microelectronics Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 186. China Resources Microelectronics Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 187. China Resources Microelectronics Recent Developments/Updates

Table 188. China Resources Microelectronics Competitive Strengths & Weaknesses

Table 189. Suzhou Nanowin Science and Technology Basic Information, Manufacturing Base and Competitors

Table 190. Suzhou Nanowin Science and Technology Major Business

Table 191. Suzhou Nanowin Science and Technology Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 192. Suzhou Nanowin Science and Technology Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 193. Suzhou Nanowin Science and Technology Recent Developments/Updates

Table 194. Suzhou Nanowin Science and Technology Competitive Strengths & Weaknesses

Table 195. MACOM Basic Information, Manufacturing Base and Competitors

Table 196. MACOM Major Business

Table 197. MACOM Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 198. MACOM Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 199. MACOM Recent Developments/Updates

Table 200. MACOM Competitive Strengths & Weaknesses

Table 201. CorEnergy Basic Information, Manufacturing Base and Competitors

Table 202. CorEnergy Major Business

Table 203. CorEnergy Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 204. CorEnergy Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 205. CorEnergy Recent Developments/Updates

Table 206. CorEnergy Competitive Strengths & Weaknesses

Table 207. Shaanxi Yuteng Electronic Technology Basic Information, Manufacturing Base and Competitors

Table 208. Shaanxi Yuteng Electronic Technology Major Business

Table 209. Shaanxi Yuteng Electronic Technology Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 210. Shaanxi Yuteng Electronic Technology Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 211. Shaanxi Yuteng Electronic Technology Recent Developments/Updates

Table 212. Shaanxi Yuteng Electronic Technology Competitive Strengths & Weaknesses

Table 213. Shin-Etsu Chemical Basic Information, Manufacturing Base and Competitors

Table 214. Shin-Etsu Chemical Major Business

Table 215. Shin-Etsu Chemical Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 216. Shin-Etsu Chemical Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 217. Shin-Etsu Chemical Recent Developments/Updates

Table 218. Shin-Etsu Chemical Competitive Strengths & Weaknesses

Table 219. SweGaN Basic Information, Manufacturing Base and Competitors

Table 220. SweGaN Major Business

Table 221. SweGaN Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 222. SweGaN Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 223. SweGaN Recent Developments/Updates

Table 224. SweGaN Competitive Strengths & Weaknesses

Table 225. Centrasky Crystal Science (Ningbo) Basic Information, Manufacturing Base and Competitors

Table 226. Centrasky Crystal Science (Ningbo) Major Business

Table 227. Centrasky Crystal Science (Ningbo) Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 228. Centrasky Crystal Science (Ningbo) Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 229. Centrasky Crystal Science (Ningbo) Recent Developments/Updates

Table 230. Centrasky Crystal Science (Ningbo) Competitive Strengths & Weaknesses

Table 231. Sino Nitride Semiconductor Basic Information, Manufacturing Base and Competitors

Table 232. Sino Nitride Semiconductor Major Business

Table 233. Sino Nitride Semiconductor Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 234. Sino Nitride Semiconductor Gallium Nitride (GaN) HEMT Epiwafers

Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 235. Sino Nitride Semiconductor Recent Developments/Updates

Table 236. Sino Nitride Semiconductor Competitive Strengths & Weaknesses

Table 237. Qingdao Cohenius Microelectronics Basic Information, Manufacturing Base and Competitors

Table 238. Qingdao Cohenius Microelectronics Major Business

Table 239. Qingdao Cohenius Microelectronics Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 240. Qingdao Cohenius Microelectronics Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 241. Qingdao Cohenius Microelectronics Recent Developments/Updates

Table 242. Qingdao Cohenius Microelectronics Competitive Strengths & Weaknesses

Table 243. GaNcool Basic Information, Manufacturing Base and Competitors

Table 244. GaNcool Major Business

Table 245. GaNcool Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 246. GaNcool Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 247. GaNcool Recent Developments/Updates

Table 248. GaNcool Competitive Strengths & Weaknesses

Table 249. BTOZ Basic Information, Manufacturing Base and Competitors

Table 250. BTOZ Major Business

Table 251. BTOZ Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 252. BTOZ Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 253. BTOZ Recent Developments/Updates

Table 254. BTOZ Competitive Strengths & Weaknesses

Table 255. Epistar Corp. Basic Information, Manufacturing Base and Competitors

Table 256. Epistar Corp. Major Business

Table 257. Epistar Corp. Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 258. Epistar Corp. Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 259. Epistar Corp. Recent Developments/Updates

Table 260. Epistar Corp. Competitive Strengths & Weaknesses

Table 261. GaN Asia Semiconductor Basic Information, Manufacturing Base and

Competitors

Table 262. GaN Asia Semiconductor Major Business

Table 263. GaN Asia Semiconductor Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 264. GaN Asia Semiconductor Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 265. GaN Asia Semiconductor Recent Developments/Updates

Table 266. GaN Asia Semiconductor Competitive Strengths & Weaknesses

Table 267. A-PRO Semicon Basic Information, Manufacturing Base and Competitors

Table 268. A-PRO Semicon Major Business

Table 269. A-PRO Semicon Gallium Nitride (GaN) HEMT Epiwafers Product and Services

Table 270. A-PRO Semicon Gallium Nitride (GaN) HEMT Epiwafers Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 271. A-PRO Semicon Recent Developments/Updates

Table 272. A-PRO Semicon Competitive Strengths & Weaknesses

Table 273. Global Key Players of Gallium Nitride (GaN) HEMT Epiwafers Upstream (Raw Materials)

Table 274. Global Gallium Nitride (GaN) HEMT Epiwafers Typical Customers

Table 275. Gallium Nitride (GaN) HEMT Epiwafers Typical Distributors

List Of Figures

LIST OF FIGURES

- Figure 1. Gallium Nitride (GaN) HEMT Epiwafers Picture
- Figure 2. World Gallium Nitride (GaN) HEMT Epiwafers Production Value: 2021 & 2025 & 2032, (USD Million)
- Figure 3. World Gallium Nitride (GaN) HEMT Epiwafers Production Value and Forecast (2021-2032) & (USD Million)
- Figure 4. World Gallium Nitride (GaN) HEMT Epiwafers Production (2021-2032) & (K Pcs)
- Figure 5. World Gallium Nitride (GaN) HEMT Epiwafers Average Price (2021-2032) & (US\$/Pcs)
- Figure 6. World Gallium Nitride (GaN) HEMT Epiwafers Production Value Market Share by Region (2021-2032)
- Figure 7. World Gallium Nitride (GaN) HEMT Epiwafers Production Market Share by Region (2021-2032)
- Figure 8. North America Gallium Nitride (GaN) HEMT Epiwafers Production (2021-2032) & (K Pcs)
- Figure 9. Europe Gallium Nitride (GaN) HEMT Epiwafers Production (2021-2032) & (K Pcs)
- Figure 10. China Gallium Nitride (GaN) HEMT Epiwafers Production (2021-2032) & (K Pcs)
- Figure 11. Japan Gallium Nitride (GaN) HEMT Epiwafers Production (2021-2032) & (K Pcs)
- Figure 12. South Korea Gallium Nitride (GaN) HEMT Epiwafers Production (2021-2032) & (K Pcs)
- Figure 13. China Taiwan Gallium Nitride (GaN) HEMT Epiwafers Production (2021-2032) & (K Pcs)
- Figure 14. Gallium Nitride (GaN) HEMT Epiwafers Market Drivers
- Figure 15. Factors Affecting Demand
- Figure 16. World Gallium Nitride (GaN) HEMT Epiwafers Consumption (2021-2032) & (K Pcs)
- Figure 17. World Gallium Nitride (GaN) HEMT Epiwafers Consumption Market Share by Region (2021-2032)
- Figure 18. United States Gallium Nitride (GaN) HEMT Epiwafers Consumption (2021-2032) & (K Pcs)
- Figure 19. China Gallium Nitride (GaN) HEMT Epiwafers Consumption (2021-2032) & (K Pcs)

- Figure 20. Europe Gallium Nitride (GaN) HEMT Epiwafers Consumption (2021-2032) & (K Pcs)
- Figure 21. Japan Gallium Nitride (GaN) HEMT Epiwafers Consumption (2021-2032) & (K Pcs)
- Figure 22. South Korea Gallium Nitride (GaN) HEMT Epiwafers Consumption (2021-2032) & (K Pcs)
- Figure 23. ASEAN Gallium Nitride (GaN) HEMT Epiwafers Consumption (2021-2032) & (K Pcs)
- Figure 24. India Gallium Nitride (GaN) HEMT Epiwafers Consumption (2021-2032) & (K Pcs)
- Figure 25. Producer Shipments of Gallium Nitride (GaN) HEMT Epiwafers by Manufacturer Revenue (\$MM) and Market Share (%): 2025
- Figure 26. Global Four-firm Concentration Ratios (CR4) for Gallium Nitride (GaN) HEMT Epiwafers Markets in 2025
- Figure 27. Global Four-firm Concentration Ratios (CR8) for Gallium Nitride (GaN) HEMT Epiwafers Markets in 2025
- Figure 28. United States VS China: Gallium Nitride (GaN) HEMT Epiwafers Production Value Market Share Comparison (2021 & 2025 & 2032)
- Figure 29. United States VS China: Gallium Nitride (GaN) HEMT Epiwafers Production Market Share Comparison (2021 & 2025 & 2032)
- Figure 30. United States VS China: Gallium Nitride (GaN) HEMT Epiwafers Consumption Market Share Comparison (2021 & 2025 & 2032)
- Figure 31. United States Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production Market Share 2025
- Figure 32. China Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production Market Share 2025
- Figure 33. Rest of World Based Manufacturers Gallium Nitride (GaN) HEMT Epiwafers Production Market Share 2025
- Figure 34. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Substrate Type, (USD Million), 2021 & 2025 & 2032
- Figure 35. World Gallium Nitride (GaN) HEMT Epiwafers Production Value Market Share by Substrate Type in 2025
- Figure 36. GaN-on-SiC Wafer
- Figure 37. GaN-on-Si Wafer
- Figure 38. GaN-on-Sapphire Wafer
- Figure 39. Others
- Figure 40. World Gallium Nitride (GaN) HEMT Epiwafers Production Market Share by Substrate Type (2021-2032)
- Figure 41. World Gallium Nitride (GaN) HEMT Epiwafers Production Value Market

Share by Substrate Type (2021-2032)

Figure 42. World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Substrate Type (2021-2032) & (US\$/Pcs)

Figure 43. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Business Model, (USD Million), 2021 & 2025 & 2032

Figure 44. World Gallium Nitride (GaN) HEMT Epiwafers Production Value Market Share by Business Model in 2025

Figure 45. Open Epiwafer

Figure 46. Captive Epiwafer

Figure 47. World Gallium Nitride (GaN) HEMT Epiwafers Production Market Share by Business Model (2021-2032)

Figure 48. World Gallium Nitride (GaN) HEMT Epiwafers Production Value Market Share by Business Model (2021-2032)

Figure 49. World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Business Model (2021-2032) & (US\$/Pcs)

Figure 50. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Market, (USD Million), 2021 & 2025 & 2032

Figure 51. World Gallium Nitride (GaN) HEMT Epiwafers Production Value Market Share by Market in 2025

Figure 52. Mobile and Consumer

Figure 53. Telecom and Infrastructure

Figure 54. Defense & Aerospace

Figure 55. Industrial

Figure 56. Automotive & Mobility

Figure 57. Others

Figure 58. World Gallium Nitride (GaN) HEMT Epiwafers Production Market Share by Market (2021-2032)

Figure 59. World Gallium Nitride (GaN) HEMT Epiwafers Production Value Market Share by Market (2021-2032)

Figure 60. World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Market (2021-2032) & (US\$/Pcs)

Figure 61. World Gallium Nitride (GaN) HEMT Epiwafers Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 62. World Gallium Nitride (GaN) HEMT Epiwafers Production Value Market Share by Application in 2025

Figure 63. GaN HEMT RF Devices

Figure 64. GaN HEMT Power Devices

Figure 65. World Gallium Nitride (GaN) HEMT Epiwafers Production Market Share by Application (2021-2032)

Figure 66. World Gallium Nitride (GaN) HEMT Epiwafers Production Value Market Share by Application (2021-2032)

Figure 67. World Gallium Nitride (GaN) HEMT Epiwafers Average Price by Application (2021-2032) & (US\$/Pcs)

Figure 68. Gallium Nitride (GaN) HEMT Epiwafers Industry Chain

Figure 69. Gallium Nitride (GaN) HEMT Epiwafers Procurement Model

Figure 70. Gallium Nitride (GaN) HEMT Epiwafers Sales Model

Figure 71. Gallium Nitride (GaN) HEMT Epiwafers Sales Channels, Direct Sales, and Distribution

Figure 72. Methodology

Figure 73. Research Process and Data Source

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