

# Global Gallium Nitride (GaN) HEMT Epiwafers 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 Gallium Nitride (GaN) HEMT Epiwafers market size was valued at US\$ 571 million in 2025 and is forecast to a readjusted size of US\$ 1138 million by 2032 with a CAGR of 10.1% during review period.

A GaN HEMT epitaxial wafer is a device-ready wafer in which a multi-layer III-nitride heterostructure?most commonly an AlGaN/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 AlGaN, 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 project 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 is a detailed and comprehensive analysis for global Gallium Nitride (GaN) HEMT Epiwafers market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Substrate Type 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 Gallium Nitride (GaN) HEMT Epiwafers market size and forecasts, in consumption value (\$ Million), sales quantity (K Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global Gallium Nitride (GaN) HEMT Epiwafers 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 Gallium Nitride (GaN) HEMT Epiwafers market size and forecasts, by Substrate Type and by Application, in consumption value (\$ Million), sales quantity (K Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global Gallium Nitride (GaN) HEMT Epiwafers 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 Gallium Nitride (GaN) HEMT Epiwafers

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 Gallium Nitride (GaN) HEMT Epiwafers 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 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.

## **Market Segmentation**

Gallium Nitride (GaN) HEMT Epiwafers market is split by Substrate Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Substrate Type, 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 Substrate Type

GaN-on-SiC Wafer

GaN-on-Si Wafer

GaN-on-Sapphire Wafer

Others

### Market segment by Business Model

Open Epiwafer

Captive Epiwafer

### Market segment by Market

Mobile and Consumer

Telecom and Infrastructure

Defense & Aerospace

Industrial

Automotive & Mobility

Others

#### Market segment by Application

GaN HEMT RF Devices

GaN HEMT Power Devices

#### Major players covered

Innoscence

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

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 Gallium Nitride (GaN) HEMT Epiwafers product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Gallium Nitride (GaN) HEMT Epiwafers, with price, sales quantity, revenue, and global market share of Gallium Nitride (GaN) HEMT Epiwafers from 2021 to 2026.

Chapter 3, the Gallium Nitride (GaN) HEMT Epiwafers competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Gallium Nitride (GaN) HEMT Epiwafers 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 Substrate Type and by Application, with sales market share and growth rate by Substrate Type, 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 Gallium Nitride (GaN) HEMT Epiwafers market forecast, by regions, by Substrate Type, 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 Gallium Nitride (GaN) HEMT Epiwafers.

Chapter 14 and 15, to describe Gallium Nitride (GaN) HEMT Epiwafers sales channel, distributors, customers, research findings and conclusion.

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