

Global Gallium Oxide Single Crystal Substrate Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Gallium Oxide Single Crystal Substrate market size is expected to reach \$ 481 million by 2032, rising at a market growth of 24.1% CAGR during the forecast period (2026-2032).

In 2024, global sales of gallium oxide single crystal substrates reached 21.3 thousand units, with an average selling price of US\$4200 per unit. Gallium oxide single crystal substrates, an ultra-wide bandgap semiconductor substrate made from α -Ga₂O₃ crystals, feature a 4.8 eV bandgap, a high breakdown electric field, and low leakage current, making them a core material for the next generation of power and RF devices. Upstream raw materials include high-purity gallium oxide powder and crystal growth crucible materials (such as platinum and iridium). Major suppliers include Furuya Metal, Tosoh, Tanaka Kikinzoku, and Heraeus. Downstream applications include high-voltage power MOSFETs, RF amplifiers, on-board charging modules, and photodetector chips. Major customers include Rohm, Infineon, Mitsubishi Electric, and Huawei HiSilicon. Global production capacity is approximately 70,000 units per year, with an industry average gross profit margin of 45%. Upstream high-purity gallium oxide powder and precious metal crucible costs account for 58% of total costs, while downstream power electronics and RF module manufacturing accounts for 72% of total consumption. In the future, gallium oxide single crystal substrates will become the core material of the third generation of power semiconductors after SiC and GaN, and the market will develop towards large size, low defect rate and mass production cost control.

The gallium oxide single crystal substrate market is currently at a critical stage, transitioning from laboratory research and development to early industrialization. Its development prospects are attracting considerable industry attention, but it also faces clear technical and commercialization challenges.

From a market perspective, the core competitiveness of gallium oxide substrates stems from the performance breakthroughs and potential cost advantages brought about by

their ultra-wide bandgap characteristics. Against the backdrop of carbon neutrality, global demand for energy-efficient power electronics has surged in areas such as energy infrastructure, new energy vehicles, and industrial motor drives. Gallium oxide's critical breakdown field strength reaches 8 MV/cm, far exceeding that of silicon carbide and gallium nitride. This means that at the same withstand voltage level, devices can be made thinner and have lower resistance, significantly reducing power loss and system size. More importantly, single crystals can be grown using melt processes (such as the guided mold method). Compared to the high-temperature chemical vapor deposition methods required for silicon carbide and gallium nitride, production costs are expected to be lower and scalable to larger sizes (e.g., 6 inches). This creates a highly attractive cost-effective blueprint for large-scale application in the future medium- and ultra-high-voltage (1.2kV-10kV) power semiconductor market. However, the full-scale market boom is still limited by two core technical bottlenecks: thermal management challenges and homoepitaxial growth quality. Gallium oxide has poor thermal conductivity, only about one-tenth that of silicon carbide. This makes it difficult to quickly dissipate the heat generated by devices during high-voltage and high-current operation, becoming an Achilles' heel that limits their reliability and lifespan. Furthermore, while β -phase gallium oxide single crystals have been commercialized, the substrate's dislocation density needs to be further reduced, and the high-quality, high-uniformity homoepitaxial growth process needs to be optimized, directly impacting the yield and performance consistency of the final device.

In summary, the market prospects for gallium oxide single crystal substrates are promising, but the path forward is clear yet challenging. In the short term, the market will focus on specific niche applications, such as ultra-high voltage direct current transmission, rail transit converters, and aerospace power systems, where volume and efficiency are paramount and cost sensitivity is relatively low. Meanwhile, in the non-power-intensive field of solar-blind ultraviolet detection, gallium oxide, leveraging its inherent advantages, has already begun commercial application. In the medium to long term, whether gallium oxide can truly become a disruptor in the power semiconductor market depends on breakthroughs in thermal management technologies (such as wafer bonding and composite materials), the maturity of 8-inch substrate fabrication technology, and the collaborative innovation and cost control capabilities of the entire industry chain. It will not completely replace silicon carbide and gallium nitride, but is more likely to complement and coexist within specific voltage ranges, jointly driving the evolution of power electronics technology towards greater efficiency and compactness. This report studies the global Gallium Oxide Single Crystal Substrate production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Gallium Oxide Single Crystal Substrate 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 Oxide Single Crystal Substrate that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Gallium Oxide Single Crystal Substrate total production and demand, 2021-2032, (K Pcs)

Global Gallium Oxide Single Crystal Substrate total production value, 2021-2032, (USD Million)

Global Gallium Oxide Single Crystal Substrate production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs), (based on production site)

Global Gallium Oxide Single Crystal Substrate consumption by region & country, CAGR, 2021-2032 & (K Pcs)

U.S. VS China: Gallium Oxide Single Crystal Substrate domestic production, consumption, key domestic manufacturers and share

Global Gallium Oxide Single Crystal Substrate production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Pcs)

Global Gallium Oxide Single Crystal Substrate production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

Global Gallium Oxide Single Crystal Substrate production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

This report profiles key players in the global Gallium Oxide Single Crystal Substrate 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 Novel Crystal Technology, Kyma Technologies, Atecom Technology, Garen Semi, CETC, Hangzhou Fujia, Beijing MIG, Gao Semi, CSW Xiamen, Evolusia, 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 Oxide Single Crystal Substrate 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 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 Oxide Single Crystal Substrate Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Gallium Oxide Single Crystal Substrate Market, Segmentation by Type:

2 Inches

4 Inches

Square

6 Inches

Other

Global Gallium Oxide Single Crystal Substrate Market, Segmentation by Crystal Orientation:

Crystal Orientation: (010)

Crystal Orientation: (001)

Crystal Orientation: (100)

Global Gallium Oxide Single Crystal Substrate Market, Segmentation by Composition:

Pure Gallium Oxide

With Doping (such as tin/iron)

Global Gallium Oxide Single Crystal Substrate Market, Segmentation by Application:

Automotive

Telecommunication

Education and Research

Others

Companies Profiled:

Novel Crystal Technology

Kyma Technologies

Atecom Technology

Garen Semi

CETC

Hangzhou Fujia

Beijing MIG

Gao Semi

CSW Xiamen

Evolusia

Key Questions Answered:

1. How big is the global Gallium Oxide Single Crystal Substrate market?
2. What is the demand of the global Gallium Oxide Single Crystal Substrate market?
3. What is the year over year growth of the global Gallium Oxide Single Crystal Substrate market?
4. What is the production and production value of the global Gallium Oxide Single Crystal Substrate market?
5. Who are the key producers in the global Gallium Oxide Single Crystal Substrate market?
6. What are the growth factors driving the market demand?

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