

# Global GaN HEMT Epitaxial Wafer Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global GaN HEMT Epitaxial Wafer 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).

GaN HEMT epitaxial wafers are silicon-carbide (SiC) or silicon (Si) substrates on which GaN heterostructures are grown for high-electron-mobility transistors (HEMTs). The two principal product families are GaN-on-SiC epi wafers ? preferred for the highest-power, highest-frequency and highest-reliability RF and power applications due to superior thermal conductivity and lattice match ? and GaN-on-Si epi wafers ? offering much lower substrate cost and larger wafer diameters (200?300 mm potential) suited to volume power-conversion and consumer/IT applications. Within each family, epi variants differ by buffer architecture, GaN channel thickness, AlGa<sub>N</sub>/Ga<sub>N</sub> barrier composition, doping profiles, and back-side treatments (e.g., C-doping, polarization engineering) optimized for RF linearity, power density, or switching speed. Key application areas include RF power amplifiers for 5G/mmWave and radar, high-efficiency fast chargers and adapters, server power supplies, electric-vehicle onboard chargers and DC?DC converters, industrial motor drives, and emerging RF/mmWave telecommunications and defense systems.

The GaN HEMT Epitaxial Wafer industry covers wafers on which a GaN-based HEMT heterostructure (most commonly AlGa<sub>N</sub>/Ga<sub>N</sub>, sometimes InAlN/GaN) is grown to create the high-mobility channel required for RF and power HEMTs. Commercial products are typically sold as qualified ?epi stacks? (buffer/barrier/cap variants) on multiple substrate platforms; for example, NTT-AT explicitly lists AlGa<sub>N</sub>/Ga<sub>N</sub> HEMT epi and InAlN/GaN HEMT epi offerings across Sapphire (2?3'), Si (4?8'), SiC (4?6'), and native GaN (2?4'). In practice, the industry?s main segmentation is by substrate platform/material system and wafer diameter: GaN-on-SiC for premium RF/high-power density, GaN-on-Si for scalable/cost-driven power and some RF, and smaller niches such as sapphire/native

GaN/engineered substrates. The key value features emphasized by platform suppliers include high power density, wide-bandgap operation at higher voltage/temperature, and performance/ruggedness advantages that enable more compact RF amplifiers and higher-efficiency power conversion.

Downstream applications split into two dominant pillars: RF GaN (e.g., infrastructure amplifiers, defense/aerospace RF) and Power GaN (e.g., high-efficiency DC/DC and power conversion). In RF, suppliers explicitly position RF-GaN epiwafers as enabling more powerful and efficient RF amplifiers due to higher power density. In power, current commercial roadmaps increasingly center on large-diameter GaN-on-Si stacks (especially 150/200 mm, with 300 mm in development) and voltage-class tailoring (e.g., 200V/650V HEMT devices and ICs), as reflected in Soitec's disclosed GaN platform offerings and scale-up direction. Key future trends are: (1) wafer-size migration (power: 200 mm mainstreaming and 300 mm development; RF: expanding 150 mm GaN-on-SiC supply), (2) epi-structure innovation to improve trapping/thermal behavior and robustness (e.g., SweGaN's "buffer-free" GaN-on-SiC concept positioning for telecom/defense requirements), and (3) tighter reliability/qualification frameworks in power conversion, supported by industry guidelines such as JEDEC JEP180 for switching reliability evaluation, which raises the bar for epi quality and process control while helping standardize customer qualification.

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 GaN HEMT Epitaxial Wafer production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for GaN HEMT Epitaxial Wafer 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 GaN HEMT Epitaxial Wafer that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global GaN HEMT Epitaxial Wafer total production and demand, 2021-2032, (Pcs)

Global GaN HEMT Epitaxial Wafer total production value, 2021-2032, (USD Million)

Global GaN HEMT Epitaxial Wafer production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Pcs), (based on production site)

Global GaN HEMT Epitaxial Wafer consumption by region & country, CAGR, 2021-2032 & (Pcs)

U.S. VS China: GaN HEMT Epitaxial Wafer domestic production, consumption, key domestic manufacturers and share

Global GaN HEMT Epitaxial Wafer production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Pcs)

Global GaN HEMT Epitaxial Wafer production by Substrate Type, production, value, CAGR, 2021-2032, (USD Million) & (Pcs)

Global GaN HEMT Epitaxial Wafer production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Pcs)

This report profiles key players in the global GaN HEMT Epitaxial Wafer 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 GaN HEMT Epitaxial Wafer market

**Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Pcs) and average price (USD/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 GaN HEMT Epitaxial Wafer Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global GaN HEMT Epitaxial Wafer Market, Segmentation by Substrate Type:

GaN-on-SiC Epitaxial Wafer

GaN-on-Si Epitaxial Wafer

GaN-on-Sapphire Wafer

Others

Global GaN HEMT Epitaxial Wafer Market, Segmentation by Business Model:

Open Epiwafer

Captive Epiwafer

Global GaN HEMT Epitaxial Wafer 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 GaN HEMT Epitaxial Wafer market?
2. What is the demand of the global GaN HEMT Epitaxial Wafer market?
3. What is the year over year growth of the global GaN HEMT Epitaxial Wafer market?
4. What is the production and production value of the global GaN HEMT Epitaxial Wafer market?
5. Who are the key producers in the global GaN HEMT Epitaxial Wafer market?
6. What are the growth factors driving the market demand?

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