

# Global GaN MOCVD Equipment Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global GaN MOCVD Equipment market size is expected to reach \$ 670 million by 2032, rising at a market growth of 7.0% CAGR during the forecast period (2026-2032).

GaN MOCVD equipment refers to integrated toolsets used to grow III-nitride epitaxial layers on substrates such as sapphire, SiC, silicon, or GaN via metal-organic chemical vapor deposition. A typical tool comprises the reactor and chamber, wafer handling and thermal management, gas and metal-organic precursor delivery and switching, pressure and flow control, vacuum and exhaust handling, abatement and safety interlocks, in-situ monitoring and process control software, as well as automation and cleanroom integration, enabling stable control of key epitaxy metrics including thickness, composition, doping, stress, and within-wafer uniformity. In 2025, global production of GaN MOCVD systems reached 185 units, with an average selling price of USD 2.154 million per unit.

GaN MOCVD equipment is a critical-tool segment in compound semiconductors, characterized by high process barriers, long qualification cycles, and project-based deliveries. Industry momentum is closely linked to downstream capacity expansion cycles, qualification windows, and capital spending cadence, leading to phase-driven year-to-year fluctuations. Demand is driven by LED line upgrades and replacement, accelerating penetration of GaN power devices in EV charging, energy storage, and data-center power, and continued adoption of RF devices in high-frequency/high-power applications. Procurement decisions resemble platform introduction and yield-ramp projects, emphasizing particle/defect control, consistency of thermal and flow fields, uptime, and lot-to-lot stability. Supply-side competition centers on system integration, long-term operating stability, and safety/compliance systems, with strong requirements for on-site delivery and service assurance. Regionally, demand concentrates in clusters

with active epitaxy manufacturing and stronger ecosystems, forming a dual-engine pattern where manufacturing bases drive volume tool deployments while R&D centers pull process iteration and platform upgrades. As customers replicate capacity across multiple sites, localized delivery capability, service coverage, and availability of critical spare parts become more important. Product-wise, the market can be tiered by substrate platform (sapphire/SiC/silicon/GaN), wafer size, reactor architecture and wafer-motion scheme, automation level, and in-situ monitoring configuration. R&D and pilot lines prioritize recipe flexibility and fast changeover, while volume production prioritizes yield, uptime, repeatability, and consistency; customers often remain on the same platform when moving from development to production to reduce re-qualification cost and shorten ramp time. Application-wise, LEDs remain a major installed-base driver, power devices continuously raise requirements for low defect density and thick-epi capability, and RF applications emphasize stable, replicable control of uniformity and doping—pushing systems toward tighter thermal uniformity, lower particles, stronger in-situ monitoring, and higher automation. In cost structure, value and cost concentrate in the reactor and chamber, multi-zone thermal management, precursor and high-purity gas delivery and switching, mass-flow and pressure control, vacuum and exhaust handling, abatement and safety interlocks, and process control software with in-situ monitoring. Critical chamber parts, thermal/flow-control subsystems, and abatement units are often the key determinants of performance and delivery cost. On the manufacturing side, single-line capacity defined by assembly, integration, burn-in testing, and factory acceptance is 8–20 tools per year, while actual deliveries are constrained by lead times of critical components, engineering manpower, and customer on-site installation and acceptance scheduling. Sector gross margin is 35%–40%, with profit formation relying on system-level premium and commissioning capability, and more on differentiated process capability and reliability premium than on scale manufacturing alone. Along the value chain, upstream spans precision parts and materials, high-purity gases and chemicals, valves and mass-flow control, and vacuum/abatement modules; midstream focuses on full-system integration and software control; downstream is epitaxy manufacturing for LEDs and GaN power/RF devices. The competitive landscape is highly concentrated with high switching costs, and barriers to entry arise from process consistency and reliability validation, safety/compliance systems, and on-site delivery and service capability. Looking ahead, tools will continue to evolve toward higher automation, stronger in-situ monitoring, lower particles and defects, higher uptime, and more robust emissions control, while data closed loops and digital operations improve lot-to-lot stability to support more demanding applications and yield targets.

This report studies the global GaN MOCVD Equipment production, demand, key

manufacturers, and key regions.

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

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

Global GaN MOCVD Equipment total production and demand, 2021-2032, (Units)

Global GaN MOCVD Equipment total production value, 2021-2032, (USD Million)

Global GaN MOCVD Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global GaN MOCVD Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: GaN MOCVD Equipment domestic production, consumption, key domestic manufacturers and share

Global GaN MOCVD Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global GaN MOCVD Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global GaN MOCVD Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global GaN MOCVD Equipment 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 AIXTRON Technologies, Advanced Micro-Fabrication Equipment, Topecsh, Veeco, Taiyo Nippon Sanso, NuFlare Technology, 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 MOCVD Equipment market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) 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 GaN MOCVD Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global GaN MOCVD Equipment Market, Segmentation by Type:

Horizontal

Rotation & Revolution

#### Global GaN MOCVD Equipment Market, Segmentation by Substrate/Wafer Diameter:

2 inch

3–4 inch

6 inch

8 inch

### Global GaN MOCVD Equipment Market, Segmentation by Chamber Count:

Single-chamber

Dual-chamber

Multi-chamber

### Global GaN MOCVD Equipment Market, Segmentation by Application:

LED

Power Devices

Lasers

RF Devices

Research

### Companies Profiled:

AIXTRON Technologies

Advanced Micro-Fabrication Equipment

Topecsh

Veeco

Taiyo Nippon Sanso

NuFlare Technology

**Key Questions Answered:**

1. How big is the global GaN MOCVD Equipment market?
2. What is the demand of the global GaN MOCVD Equipment market?
3. What is the year over year growth of the global GaN MOCVD Equipment market?
4. What is the production and production value of the global GaN MOCVD Equipment market?
5. Who are the key producers in the global GaN MOCVD Equipment market?
6. What are the growth factors driving the market demand?

## Contents

### 1 SUPPLY SUMMARY

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

### 2 DEMAND SUMMARY

- 2.1 World GaN MOCVD Equipment Demand (2021-2032)
- 2.2 World GaN MOCVD Equipment Consumption by Region
  - 2.2.1 World GaN MOCVD Equipment Consumption by Region (2021-2026)
  - 2.2.2 World GaN MOCVD Equipment Consumption Forecast by Region (2027-2032)
- 2.3 United States GaN MOCVD Equipment Consumption (2021-2032)
- 2.4 China GaN MOCVD Equipment Consumption (2021-2032)
- 2.5 Europe GaN MOCVD Equipment Consumption (2021-2032)
- 2.6 Japan GaN MOCVD Equipment Consumption (2021-2032)
- 2.7 South Korea GaN MOCVD Equipment Consumption (2021-2032)
- 2.8 ASEAN GaN MOCVD Equipment Consumption (2021-2032)
- 2.9 India GaN MOCVD Equipment Consumption (2021-2032)

### 3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World GaN MOCVD Equipment Production Value by Manufacturer (2021-2026)

- 3.2 World GaN MOCVD Equipment Production by Manufacturer (2021-2026)
- 3.3 World GaN MOCVD Equipment Average Price by Manufacturer (2021-2026)
- 3.4 GaN MOCVD Equipment Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
  - 3.5.1 Global GaN MOCVD Equipment Industry Rank of Major Manufacturers
  - 3.5.2 Global Concentration Ratios (CR4) for GaN MOCVD Equipment in 2025
  - 3.5.3 Global Concentration Ratios (CR8) for GaN MOCVD Equipment in 2025
- 3.6 GaN MOCVD Equipment Market: Overall Company Footprint Analysis
  - 3.6.1 GaN MOCVD Equipment Market: Region Footprint
  - 3.6.2 GaN MOCVD Equipment Market: Company Product Type Footprint
  - 3.6.3 GaN MOCVD Equipment 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: GaN MOCVD Equipment Production Value Comparison
  - 4.1.1 United States VS China: GaN MOCVD Equipment Production Value Comparison (2021 & 2025 & 2032)
  - 4.1.2 United States VS China: GaN MOCVD Equipment Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: GaN MOCVD Equipment Production Comparison
  - 4.2.1 United States VS China: GaN MOCVD Equipment Production Comparison (2021 & 2025 & 2032)
  - 4.2.2 United States VS China: GaN MOCVD Equipment Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: GaN MOCVD Equipment Consumption Comparison
  - 4.3.1 United States VS China: GaN MOCVD Equipment Consumption Comparison (2021 & 2025 & 2032)
  - 4.3.2 United States VS China: GaN MOCVD Equipment Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based GaN MOCVD Equipment Manufacturers and Market Share, 2021-2026
  - 4.4.1 United States Based GaN MOCVD Equipment Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers GaN MOCVD Equipment Production Value (2021-2026)

4.4.3 United States Based Manufacturers GaN MOCVD Equipment Production (2021-2026)

4.5 China Based GaN MOCVD Equipment Manufacturers and Market Share

4.5.1 China Based GaN MOCVD Equipment Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers GaN MOCVD Equipment Production Value (2021-2026)

4.5.3 China Based Manufacturers GaN MOCVD Equipment Production (2021-2026)

4.6 Rest of World Based GaN MOCVD Equipment Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based GaN MOCVD Equipment Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers GaN MOCVD Equipment Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers GaN MOCVD Equipment Production (2021-2026)

## **5 MARKET ANALYSIS BY TYPE**

5.1 World GaN MOCVD Equipment Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Horizontal

5.2.2 Rotation & Revolution

5.3 Market Segment by Type

5.3.1 World GaN MOCVD Equipment Production by Type (2021-2032)

5.3.2 World GaN MOCVD Equipment Production Value by Type (2021-2032)

5.3.3 World GaN MOCVD Equipment Average Price by Type (2021-2032)

## **6 MARKET ANALYSIS BY SUBSTRATE/WAFER DIAMETER**

6.1 World GaN MOCVD Equipment Market Size Overview by Substrate/Wafer Diameter: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Substrate/Wafer Diameter

6.2.1 ?2 inch

6.2.2 3–4 inch

6.2.3 6 inch

6.2.4 8 inch

6.3 Market Segment by Substrate/Wafer Diameter

6.3.1 World GaN MOCVD Equipment Production by Substrate/Wafer Diameter (2021-2032)

6.3.2 World GaN MOCVD Equipment Production Value by Substrate/Wafer Diameter (2021-2032)

6.3.3 World GaN MOCVD Equipment Average Price by Substrate/Wafer Diameter (2021-2032)

## **7 MARKET ANALYSIS BY CHAMBER COUNT**

7.1 World GaN MOCVD Equipment Market Size Overview by Chamber Count: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Chamber Count

7.2.1 Single-chamber

7.2.2 Dual-chamber

7.2.3 Multi-chamber

7.3 Market Segment by Chamber Count

7.3.1 World GaN MOCVD Equipment Production by Chamber Count (2021-2032)

7.3.2 World GaN MOCVD Equipment Production Value by Chamber Count (2021-2032)

7.3.3 World GaN MOCVD Equipment Average Price by Chamber Count (2021-2032)

## **8 MARKET ANALYSIS BY APPLICATION**

8.1 World GaN MOCVD Equipment Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 LED

8.2.2 Power Devices

8.2.3 Lasers

8.2.4 RF Devices

8.2.5 Research

8.3 Market Segment by Application

8.3.1 World GaN MOCVD Equipment Production by Application (2021-2032)

8.3.2 World GaN MOCVD Equipment Production Value by Application (2021-2032)

8.3.3 World GaN MOCVD Equipment Average Price by Application (2021-2032)

## **9 COMPANY PROFILES**

## 9.1 AIXTRON Technologies

9.1.1 AIXTRON Technologies Details

9.1.2 AIXTRON Technologies Major Business

9.1.3 AIXTRON Technologies GaN MOCVD Equipment Product and Services

9.1.4 AIXTRON Technologies GaN MOCVD Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 AIXTRON Technologies Recent Developments/Updates

9.1.6 AIXTRON Technologies Competitive Strengths & Weaknesses

## 9.2 Advanced Micro-Fabrication Equipment

9.2.1 Advanced Micro-Fabrication Equipment Details

9.2.2 Advanced Micro-Fabrication Equipment Major Business

9.2.3 Advanced Micro-Fabrication Equipment GaN MOCVD Equipment Product and Services

9.2.4 Advanced Micro-Fabrication Equipment GaN MOCVD Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Advanced Micro-Fabrication Equipment Recent Developments/Updates

9.2.6 Advanced Micro-Fabrication Equipment Competitive Strengths & Weaknesses

## 9.3 Topecsh

9.3.1 Topecsh Details

9.3.2 Topecsh Major Business

9.3.3 Topecsh GaN MOCVD Equipment Product and Services

9.3.4 Topecsh GaN MOCVD Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Topecsh Recent Developments/Updates

9.3.6 Topecsh Competitive Strengths & Weaknesses

## 9.4 Veeco

9.4.1 Veeco Details

9.4.2 Veeco Major Business

9.4.3 Veeco GaN MOCVD Equipment Product and Services

9.4.4 Veeco GaN MOCVD Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Veeco Recent Developments/Updates

9.4.6 Veeco Competitive Strengths & Weaknesses

## 9.5 Taiyo Nippon Sanso

9.5.1 Taiyo Nippon Sanso Details

9.5.2 Taiyo Nippon Sanso Major Business

9.5.3 Taiyo Nippon Sanso GaN MOCVD Equipment Product and Services

9.5.4 Taiyo Nippon Sanso GaN MOCVD Equipment Production, Price, Value, Gross

## Margin and Market Share (2021-2026)

9.5.5 Taiyo Nippon Sanso Recent Developments/Updates

9.5.6 Taiyo Nippon Sanso Competitive Strengths & Weaknesses

## 9.6 NuFlare Technology

9.6.1 NuFlare Technology Details

9.6.2 NuFlare Technology Major Business

9.6.3 NuFlare Technology GaN MOCVD Equipment Product and Services

9.6.4 NuFlare Technology GaN MOCVD Equipment Production, Price, Value, Gross

## Margin and Market Share (2021-2026)

9.6.5 NuFlare Technology Recent Developments/Updates

9.6.6 NuFlare Technology Competitive Strengths & Weaknesses

## **10 INDUSTRY CHAIN ANALYSIS**

10.1 GaN MOCVD Equipment Industry Chain

10.2 GaN MOCVD Equipment Upstream Analysis

10.2.1 GaN MOCVD Equipment Core Raw Materials

10.2.2 Main Manufacturers of GaN MOCVD Equipment Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 GaN MOCVD Equipment Production Mode

10.6 GaN MOCVD Equipment Procurement Model

10.7 GaN MOCVD Equipment Industry Sales Model and Sales Channels

10.7.1 GaN MOCVD Equipment Sales Model

10.7.2 GaN MOCVD Equipment 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 GaN MOCVD Equipment Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World GaN MOCVD Equipment Production Value by Region (2021-2026) & (USD Million)
- Table 3. World GaN MOCVD Equipment Production Value by Region (2027-2032) & (USD Million)
- Table 4. World GaN MOCVD Equipment Production Value Market Share by Region (2021-2026)
- Table 5. World GaN MOCVD Equipment Production Value Market Share by Region (2027-2032)
- Table 6. World GaN MOCVD Equipment Production by Region (2021-2026) & (Units)
- Table 7. World GaN MOCVD Equipment Production by Region (2027-2032) & (Units)
- Table 8. World GaN MOCVD Equipment Production Market Share by Region (2021-2026)
- Table 9. World GaN MOCVD Equipment Production Market Share by Region (2027-2032)
- Table 10. World GaN MOCVD Equipment Average Price by Region (2021-2026) & (K US\$/Unit)
- Table 11. World GaN MOCVD Equipment Average Price by Region (2027-2032) & (K US\$/Unit)
- Table 12. GaN MOCVD Equipment Major Market Trends
- Table 13. World GaN MOCVD Equipment Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)
- Table 14. World GaN MOCVD Equipment Consumption by Region (2021-2026) & (Units)
- Table 15. World GaN MOCVD Equipment Consumption Forecast by Region (2027-2032) & (Units)
- Table 16. World GaN MOCVD Equipment Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key GaN MOCVD Equipment Producers in 2025
- Table 18. World GaN MOCVD Equipment Production by Manufacturer (2021-2026) & (Units)
- Table 19. Production Market Share of Key GaN MOCVD Equipment Producers in 2025
- Table 20. World GaN MOCVD Equipment Average Price by Manufacturer (2021-2026)

& (K US\$/Unit)

Table 21. Global GaN MOCVD Equipment Company Evaluation Quadrant

Table 22. World GaN MOCVD Equipment Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and GaN MOCVD Equipment Production Site of Key Manufacturer

Table 24. GaN MOCVD Equipment Market: Company Product Type Footprint

Table 25. GaN MOCVD Equipment Market: Company Product Application Footprint

Table 26. GaN MOCVD Equipment Competitive Factors

Table 27. GaN MOCVD Equipment New Entrant and Capacity Expansion Plans

Table 28. GaN MOCVD Equipment Mergers & Acquisitions Activity

Table 29. United States VS China GaN MOCVD Equipment Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China GaN MOCVD Equipment Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China GaN MOCVD Equipment Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based GaN MOCVD Equipment Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers GaN MOCVD Equipment Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers GaN MOCVD Equipment Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers GaN MOCVD Equipment Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers GaN MOCVD Equipment Production Market Share (2021-2026)

Table 37. China Based GaN MOCVD Equipment Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers GaN MOCVD Equipment Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers GaN MOCVD Equipment Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers GaN MOCVD Equipment Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers GaN MOCVD Equipment Production Market Share (2021-2026)

Table 42. Rest of World Based GaN MOCVD Equipment Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers GaN MOCVD Equipment Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers GaN MOCVD Equipment Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers GaN MOCVD Equipment Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers GaN MOCVD Equipment Production Market Share (2021-2026)

Table 47. World GaN MOCVD Equipment Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World GaN MOCVD Equipment Production by Type (2021-2026) & (Units)

Table 49. World GaN MOCVD Equipment Production by Type (2027-2032) & (Units)

Table 50. World GaN MOCVD Equipment Production Value by Type (2021-2026) & (USD Million)

Table 51. World GaN MOCVD Equipment Production Value by Type (2027-2032) & (USD Million)

Table 52. World GaN MOCVD Equipment Average Price by Type (2021-2026) & (K US\$/Unit)

Table 53. World GaN MOCVD Equipment Average Price by Type (2027-2032) & (K US\$/Unit)

Table 54. World GaN MOCVD Equipment Production Value by Substrate/Wafer Diameter, (USD Million), 2021 & 2025 & 2032

Table 55. World GaN MOCVD Equipment Production by Substrate/Wafer Diameter (2021-2026) & (Units)

Table 56. World GaN MOCVD Equipment Production by Substrate/Wafer Diameter (2027-2032) & (Units)

Table 57. World GaN MOCVD Equipment Production Value by Substrate/Wafer Diameter (2021-2026) & (USD Million)

Table 58. World GaN MOCVD Equipment Production Value by Substrate/Wafer Diameter (2027-2032) & (USD Million)

Table 59. World GaN MOCVD Equipment Average Price by Substrate/Wafer Diameter (2021-2026) & (K US\$/Unit)

Table 60. World GaN MOCVD Equipment Average Price by Substrate/Wafer Diameter (2027-2032) & (K US\$/Unit)

Table 61. World GaN MOCVD Equipment Production Value by Chamber Count, (USD Million), 2021 & 2025 & 2032

Table 62. World GaN MOCVD Equipment Production by Chamber Count (2021-2026) & (Units)

Table 63. World GaN MOCVD Equipment Production by Chamber Count (2027-2032) &

(Units)

Table 64. World GaN MOCVD Equipment Production Value by Chamber Count (2021-2026) & (USD Million)

Table 65. World GaN MOCVD Equipment Production Value by Chamber Count (2027-2032) & (USD Million)

Table 66. World GaN MOCVD Equipment Average Price by Chamber Count (2021-2026) & (K US\$/Unit)

Table 67. World GaN MOCVD Equipment Average Price by Chamber Count (2027-2032) & (K US\$/Unit)

Table 68. World GaN MOCVD Equipment Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World GaN MOCVD Equipment Production by Application (2021-2026) & (Units)

Table 70. World GaN MOCVD Equipment Production by Application (2027-2032) & (Units)

Table 71. World GaN MOCVD Equipment Production Value by Application (2021-2026) & (USD Million)

Table 72. World GaN MOCVD Equipment Production Value by Application (2027-2032) & (USD Million)

Table 73. World GaN MOCVD Equipment Average Price by Application (2021-2026) & (K US\$/Unit)

Table 74. World GaN MOCVD Equipment Average Price by Application (2027-2032) & (K US\$/Unit)

Table 75. AIXTRON Technologies Basic Information, Manufacturing Base and Competitors

Table 76. AIXTRON Technologies Major Business

Table 77. AIXTRON Technologies GaN MOCVD Equipment Product and Services

Table 78. AIXTRON Technologies GaN MOCVD Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. AIXTRON Technologies Recent Developments/Updates

Table 80. AIXTRON Technologies Competitive Strengths & Weaknesses

Table 81. Advanced Micro-Fabrication Equipment Basic Information, Manufacturing Base and Competitors

Table 82. Advanced Micro-Fabrication Equipment Major Business

Table 83. Advanced Micro-Fabrication Equipment GaN MOCVD Equipment Product and Services

Table 84. Advanced Micro-Fabrication Equipment GaN MOCVD Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market

Share (2021-2026)

Table 85. Advanced Micro-Fabrication Equipment Recent Developments/Updates

Table 86. Advanced Micro-Fabrication Equipment Competitive Strengths & Weaknesses

Table 87. Topecsh Basic Information, Manufacturing Base and Competitors

Table 88. Topecsh Major Business

Table 89. Topecsh GaN MOCVD Equipment Product and Services

Table 90. Topecsh GaN MOCVD Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Topecsh Recent Developments/Updates

Table 92. Topecsh Competitive Strengths & Weaknesses

Table 93. Veeco Basic Information, Manufacturing Base and Competitors

Table 94. Veeco Major Business

Table 95. Veeco GaN MOCVD Equipment Product and Services

Table 96. Veeco GaN MOCVD Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Veeco Recent Developments/Updates

Table 98. Veeco Competitive Strengths & Weaknesses

Table 99. Taiyo Nippon Sanso Basic Information, Manufacturing Base and Competitors

Table 100. Taiyo Nippon Sanso Major Business

Table 101. Taiyo Nippon Sanso GaN MOCVD Equipment Product and Services

Table 102. Taiyo Nippon Sanso GaN MOCVD Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Taiyo Nippon Sanso Recent Developments/Updates

Table 104. Taiyo Nippon Sanso Competitive Strengths & Weaknesses

Table 105. NuFlare Technology Basic Information, Manufacturing Base and Competitors

Table 106. NuFlare Technology Major Business

Table 107. NuFlare Technology GaN MOCVD Equipment Product and Services

Table 108. NuFlare Technology GaN MOCVD Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. NuFlare Technology Recent Developments/Updates

Table 110. NuFlare Technology Competitive Strengths & Weaknesses

Table 111. Global Key Players of GaN MOCVD Equipment Upstream (Raw Materials)

Table 112. Global GaN MOCVD Equipment Typical Customers

Table 113. GaN MOCVD Equipment Typical Distributors

## List Of Figures

### LIST OF FIGURES

- Figure 1. GaN MOCVD Equipment Picture
- Figure 2. World GaN MOCVD Equipment Production Value: 2021 & 2025 & 2032, (USD Million)
- Figure 3. World GaN MOCVD Equipment Production Value and Forecast (2021-2032) & (USD Million)
- Figure 4. World GaN MOCVD Equipment Production (2021-2032) & (Units)
- Figure 5. World GaN MOCVD Equipment Average Price (2021-2032) & (K US\$/Unit)
- Figure 6. World GaN MOCVD Equipment Production Value Market Share by Region (2021-2032)
- Figure 7. World GaN MOCVD Equipment Production Market Share by Region (2021-2032)
- Figure 8. North America GaN MOCVD Equipment Production (2021-2032) & (Units)
- Figure 9. Europe GaN MOCVD Equipment Production (2021-2032) & (Units)
- Figure 10. China GaN MOCVD Equipment Production (2021-2032) & (Units)
- Figure 11. Japan GaN MOCVD Equipment Production (2021-2032) & (Units)
- Figure 12. GaN MOCVD Equipment Market Drivers
- Figure 13. Factors Affecting Demand
- Figure 14. World GaN MOCVD Equipment Consumption (2021-2032) & (Units)
- Figure 15. World GaN MOCVD Equipment Consumption Market Share by Region (2021-2032)
- Figure 16. United States GaN MOCVD Equipment Consumption (2021-2032) & (Units)
- Figure 17. China GaN MOCVD Equipment Consumption (2021-2032) & (Units)
- Figure 18. Europe GaN MOCVD Equipment Consumption (2021-2032) & (Units)
- Figure 19. Japan GaN MOCVD Equipment Consumption (2021-2032) & (Units)
- Figure 20. South Korea GaN MOCVD Equipment Consumption (2021-2032) & (Units)
- Figure 21. ASEAN GaN MOCVD Equipment Consumption (2021-2032) & (Units)
- Figure 22. India GaN MOCVD Equipment Consumption (2021-2032) & (Units)
- Figure 23. Producer Shipments of GaN MOCVD Equipment by Manufacturer Revenue (\$MM) and Market Share (%): 2025
- Figure 24. Global Four-firm Concentration Ratios (CR4) for GaN MOCVD Equipment Markets in 2025
- Figure 25. Global Four-firm Concentration Ratios (CR8) for GaN MOCVD Equipment Markets in 2025
- Figure 26. United States VS China: GaN MOCVD Equipment Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: GaN MOCVD Equipment Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: GaN MOCVD Equipment Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers GaN MOCVD Equipment Production Market Share 2025

Figure 30. China Based Manufacturers GaN MOCVD Equipment Production Market Share 2025

Figure 31. Rest of World Based Manufacturers GaN MOCVD Equipment Production Market Share 2025

Figure 32. World GaN MOCVD Equipment Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World GaN MOCVD Equipment Production Value Market Share by Type in 2025

Figure 34. Horizontal

Figure 35. Rotation & Revolution

Figure 36. World GaN MOCVD Equipment Production Market Share by Type (2021-2032)

Figure 37. World GaN MOCVD Equipment Production Value Market Share by Type (2021-2032)

Figure 38. World GaN MOCVD Equipment Average Price by Type (2021-2032) & (K US\$/Unit)

Figure 39. World GaN MOCVD Equipment Production Value by Substrate/Wafer Diameter, (USD Million), 2021 & 2025 & 2032

Figure 40. World GaN MOCVD Equipment Production Value Market Share by Substrate/Wafer Diameter in 2025

Figure 41. 2 inch

Figure 42. 3–4 inch

Figure 43. 6 inch

Figure 44. 8 inch

Figure 45. World GaN MOCVD Equipment Production Market Share by Substrate/Wafer Diameter (2021-2032)

Figure 46. World GaN MOCVD Equipment Production Value Market Share by Substrate/Wafer Diameter (2021-2032)

Figure 47. World GaN MOCVD Equipment Average Price by Substrate/Wafer Diameter (2021-2032) & (K US\$/Unit)

Figure 48. World GaN MOCVD Equipment Production Value by Chamber Count, (USD Million), 2021 & 2025 & 2032

Figure 49. World GaN MOCVD Equipment Production Value Market Share by Chamber

Count in 2025

Figure 50. Single-chamber

Figure 51. Dual-chamber

Figure 52. Multi-chamber

Figure 53. World GaN MOCVD Equipment Production Market Share by Chamber Count (2021-2032)

Figure 54. World GaN MOCVD Equipment Production Value Market Share by Chamber Count (2021-2032)

Figure 55. World GaN MOCVD Equipment Average Price by Chamber Count (2021-2032) & (K US\$/Unit)

Figure 56. World GaN MOCVD Equipment Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 57. World GaN MOCVD Equipment Production Value Market Share by Application in 2025

Figure 58. LED

Figure 59. Power Devices

Figure 60. Lasers

Figure 61. RF Devices

Figure 62. Research

Figure 63. World GaN MOCVD Equipment Production Market Share by Application (2021-2032)

Figure 64. World GaN MOCVD Equipment Production Value Market Share by Application (2021-2032)

Figure 65. World GaN MOCVD Equipment Average Price by Application (2021-2032) & (K US\$/Unit)

Figure 66. GaN MOCVD Equipment Industry Chain

Figure 67. GaN MOCVD Equipment Procurement Model

Figure 68. GaN MOCVD Equipment Sales Model

Figure 69. GaN MOCVD Equipment Sales Channels, Direct Sales, and Distribution

Figure 70. Methodology

Figure 71. Research Process and Data Source

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