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Global GaN and As/P MOCVD Systems Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global GaN and As/P MOCVD Systems market size is expected to reach $ 866 million by 2032, rising at a market growth of 7.8% CAGR during the forecast period (2026-2032).

GaN and As/P MOCVD Systems refer to integrated MOCVD toolsets used for III-nitride epitaxy (centered on GaN/AlGaN/InGaN) and arsenide/phosphide epitaxy (centered on GaAs/InP and related ternary/quaternary compounds), enabling stable control of key epitaxy metrics such as thickness, composition, doping, and within-wafer uniformity on the corresponding substrate platforms. A typical system 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, in-situ monitoring and process control software, safety interlocks, and abatement. In 2025, global combined production of GaN and As/P MOCVD systems totaled 227 units, with an average selling price of USD 2.157 million per unit.

The GaN and As/P MOCVD systems market is a critical-tool segment in compound semiconductors, characterized by small-batch production, high process barriers, and stringent qualification requirements. Demand behaves like project-based capital spending driven by platform introduction and yield ramp, and is tightly correlated with downstream expansion cycles, qualification windows, and capex cadence. Regionally, demand concentrates in clusters with active epitaxy manufacturing and strong device ecosystems, forming a dual-engine pattern where manufacturing sites drive volume platform deployments while R&D centers pull process iteration and platform upgrades; localized delivery and service coverage are increasingly important for share capture. From a product-structure perspective, the two material systems are tiered by substrate platform, reactor architecture and wafer-motion scheme, thermal/flow-field design, and

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the level of automation and in-situ monitoring. R&D and pilot lines prioritize recipe flexibility, fast changeover, and process-window exploration, while volume production prioritizes particle/defect control, repeatability, uptime, and lot-to-lot stability; customers often remain on the same platform when moving from development to production to reduce re-qualification cost. Application-wise, GaN systems primarily serve LEDs and GaN power/RF epitaxy, while As/P systems primarily serve lasers/VCSELs, optical communications, and related optoelectronic epitaxy, jointly pushing tools toward lower defects, tighter thermal uniformity, stronger in-situ monitoring, and higher automation. In cost structure, value and cost concentrate in the reactor and chamber, thermal management, precursor delivery and switching, pressure and flow control, vacuum and exhaust handling, safety interlocks and abatement, and process control software with in-situ monitoring; critical chamber parts, control subsystems, and abatement units often determine performance and delivery cost. On the manufacturing side, single-line capacity—defined by assembly, integration, burn-in, and factory acceptance—typically ranges from 6 to 20 tools per year, while actual deliveries are constrained by lead times of critical components, engineering manpower, and customer on-site acceptance scheduling. Sector gross margin is 35%–40%, with profit formation relying on a system-level premium and commissioning capability, complemented by sticky service revenue from spares/consumables, maintenance, upgrades/retrofits, and process support. 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 and the optoelectronic/power/RF device ecosystem. The competitive landscape is highly concentrated with high switching costs, and entry barriers are driven by process consistency and reliability validation, safety compliance, and long-term service delivery. Going forward, systems will continue to evolve toward higher automation, stronger in-situ monitoring, lower particles and defects, higher uptime, and more digitalized operations and data closed loops to improve lot-to-lot stability.

This report studies the global GaN and As/P MOCVD Systems production, demand, key manufacturers, and key regions.

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

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Highlights and key features of the study

Global GaN and As/P MOCVD Systems total production and demand, 2021-2032, (Units)
Global GaN and As/P MOCVD Systems total production value, 2021-2032, (USD Million)
Global GaN and As/P MOCVD Systems production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)
Global GaN and As/P MOCVD Systems consumption by region & country, CAGR, 2021-2032 & (Units)
U.S. VS China: GaN and As/P MOCVD Systems domestic production, consumption, key domestic manufacturers and share
Global GaN and As/P MOCVD Systems production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)
Global GaN and As/P MOCVD Systems production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)
Global GaN and As/P MOCVD Systems production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global GaN and As/P MOCVD Systems 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 and As/P MOCVD Systems 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.

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Global GaN and As/P MOCVD Systems Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global GaN and As/P MOCVD Systems Market, Segmentation by Type:

GaN-based MOCVD

GaAs/InP-based MOCVD

Global GaN and As/P MOCVD Systems Market, Segmentation by Substrate/Wafer Diameter:

?2 inch

3–4 inch

6 inch

8 inch

Global GaN and As/P MOCVD Systems Market, Segmentation by Chamber Count:

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Single-chamber

Dual-chamber

Multi-chamber

Global GaN and As/P MOCVD Systems 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 and As/P MOCVD Systems market?
2. What is the demand of the global GaN and As/P MOCVD Systems market?
3. What is the year over year growth of the global GaN and As/P MOCVD Systems

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market?
4. What is the production and production value of the global GaN and As/P MOCVD Systems market?
5. Who are the key producers in the global GaN and As/P MOCVD Systems market?
6. What are the growth factors driving the market demand?

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