

Global GaN-On-SiC Devices Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global GaN-On-SiC Devices market size is expected to reach \$ 2302 million by 2032, rising at a market growth of 6.6% CAGR during the forecast period (2026-2032).

GaN-on-SiC devices generally refer to RF/microwave/mmWave devices and ICs built on semi-insulating SiC substrates, where a GaN/AlGaN heterostructure is grown (predominantly by MOCVD) and processed into commercial products. In practical market scope, this includes discrete RF GaN power transistors (GaN HEMTs, die or packaged), GaN MMICs (monolithic microwave ICs integrating PA/driver/LNA/switch functions), and system-facing chips used inside PA and T/R building blocks. The technology rationale is to combine GaN's high power-density capability with SiC's high thermal conductivity and low RF losses, which is why GaN-on-SiC has long been positioned as the preferred stack for high power-density RF performance.

Technically, GaN-on-SiC leverages the GaN HEMT 2DEG channel to enable higher breakdown/operating voltage, higher current density, and high-frequency capability, translating into high efficiency and smaller die size at high output power. At the same time, SiC-substrate thermal handling is a first-order limiter for power density and lifetime, making thermal design (Rth/hotspots), trap-related dynamic behavior, and package parasitics/thermal paths central differentiators across device-MMIC-module integration. A key manufacturing trend is platform and wafer-size scaling: many GaN-on-SiC processes historically ran on 100mm wafers, while leading ecosystems have expanded toward 150mm (6-inch) to improve scale and cost economics; industry surveys explicitly discuss the move to 150mm at Qorvo/NXP and the cost-loading trade-offs between fully loaded 100mm lines and under-loaded 150mm lines, and technical literature highlights wafer scaling (100mm > 150mm) as a direct lever to reduce GaN MMIC unit cost.

Across applications, value chain, and market dynamics, GaN-on-SiC devices are primarily pulled by wireless infrastructure, satcom, and aerospace & defense (radar, EW, AESA T/R modules), with additional penetration into specialty industrial/microwave systems; public materials also illustrate GaN MMIC/HEMT PAs and LNAs as core building blocks for radar systems. The upstream chain spans semi-insulating SiC substrates, epitaxy (MOCVD), device/MMIC fabrication (IDMs and specialty RF foundries including trusted flows), and RF packaging & test feeding system OEMs. On the industry side, the supply base is reshaping via portfolio focus and consolidation—e.g., Wolfspeed completed the sale of its RF business to MACOM in 2023 and stated it became a pure-play SiC semiconductor manufacturer. Key trends and drivers include defense and satcom growth, higher-bandwidth RF architectures (5G/6G) demanding higher power/linearity, substrate-platform segmentation (GaN-on-Si favored for cost-sensitive high-volume RAN while GaN-on-SiC remains for ultra-high-power-density/high-reliability niches), and upstream SiC ecosystem progress from 150mm toward 200mm supported by new open R&D lines that can underpin future scale and cost-down.

This report studies the global GaN-On-SiC Devices production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global GaN-On-SiC Devices total production and demand, 2021-2032, (K Units)

Global GaN-On-SiC Devices total production value, 2021-2032, (USD Million)

Global GaN-On-SiC Devices production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global GaN-On-SiC Devices consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: GaN-On-SiC Devices domestic production, consumption, key domestic manufacturers and share

Global GaN-On-SiC Devices production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global GaN-On-SiC Devices production by Type, production, value, CAGR, 2021-2032,

(USD Million) & (K Units)

Global GaN-On-SiC Devices production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global GaN-On-SiC Devices 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 Sumitomo Electric Device Innovations (SEDI), MACOM, Qorvo, NXP, RFHIC Corporation, Raytheon, Dynax Semiconductor, Mitsubishi Electric, CETC 55, Northrop Grumman, 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-On-SiC Devices market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (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-On-SiC Devices Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global GaN-On-SiC Devices Market, Segmentation by Type:

GaN HEMT

GaN MMICs

Global GaN-On-SiC Devices Market, Segmentation by Wafer Size:

6 inch GaN-on-SiC Devices

4 inch GaN-on-SiC Devices

Global GaN-On-SiC Devices Market, Segmentation by Application:

Telecom Infrastructure

Military & Defense

Satcom

Others

Companies Profiled:

Sumitomo Electric Device Innovations (SEDI)

MACOM

Qorvo

NXP

RFHIC Corporation

Raytheon

Dynax Semiconductor

Mitsubishi Electric

CETC 55

Northrop Grumman

Ampleon

UMS RF

CETC 13

ReliaSat (Arralis)

WAVICE Inc

Microchip Technology

Youjia Technology (Suzhou) Co., Ltd

Shenzhen Taigao Technology

Hebei Sinopack Electronic Technology

Key Questions Answered:

1. How big is the global GaN-On-SiC Devices market?
2. What is the demand of the global GaN-On-SiC Devices market?
3. What is the year over year growth of the global GaN-On-SiC Devices market?
4. What is the production and production value of the global GaN-On-SiC Devices market?
5. Who are the key producers in the global GaN-On-SiC Devices market?

6. What are the growth factors driving the market demand?

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