

Global Group III-Nitride Epitaxy Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/GF5C4151C928EN.html>

Date: July 2026

Pages: 119

Price: US\$ 3,480.00 (Single User License)

ID: GF5C4151C928EN

Abstracts

According to our (Global Info Research) latest study, the global Group III-Nitride Epitaxy market size was valued at US\$ 2521 million in 2025 and is forecast to a readjusted size of US\$ 4947 million by 2032 with a CAGR of 10.0% during review period.

Group III-nitride epitaxial wafers refer to functional semiconductor wafers formed by growing GaN, AlN, InN and their ternary or quaternary alloys, such as AlGaIn, InGaIn, AlInN and AlGaInN, on sapphire, silicon, silicon carbide, GaN, AlN or engineered substrates through epitaxial growth processes such as MOCVD/MOVPE, MBE and HVPE. These wafers are designed with specific crystal quality, doping profiles, quantum well structures, heterostructures, buffer layers, stress-control schemes and defect-control strategies. They are key upstream materials for LEDs, Micro LEDs, laser diodes, UV and deep-UV LEDs, GaN power devices, GaN RF devices, HEMTs, sensors and high-temperature or high-frequency electronic devices. Their core performance indicators include dislocation density, defect control, wafer-level uniformity, thickness uniformity, composition uniformity, doping accuracy, interface quality, stress management, leakage control, two-dimensional electron gas properties, emission-wavelength consistency and device reliability.

Group III-nitride epitaxial wafers are a core upstream material platform within the wide-bandgap semiconductor value chain. The industry is not merely about producing GaN films; rather, it involves the design and controlled manufacturing of GaN, AlN, InN and their alloy-based epitaxial structures across different substrates, device architectures and end-use applications. Compared with conventional silicon-based materials, III-nitride epitaxy faces more complex challenges, including lattice mismatch, thermal-expansion mismatch, stress accumulation, crack suppression, dislocation-density

reduction, p-type doping efficiency, quantum-well uniformity and large-wafer process consistency. LED epitaxy emphasizes emission wavelength, quantum-well quality and yield; power-device epitaxy focuses on high breakdown voltage, low leakage, buffer design and dynamic on-resistance; RF epitaxy values two-dimensional electron gas mobility, thermal management and high-frequency reliability; and deep-UV epitaxy is constrained by high-Al-content AlGaIn growth, p-type doping and light-extraction efficiency. For this reason, the proper industry scope should be defined as Group III-nitride epitaxial wafers, rather than being broadened to all nitride films, coatings or ceramic materials. From a supply-side perspective, the III-nitride epitaxy market is clearly segmented by application and substrate platform. GaN-on-sapphire epitaxy for LEDs is already mature, with strong industrial bases in China, Japan, Taiwan, China and South Korea. Competition in this segment is mainly driven by cost, wavelength uniformity, yield and large-scale manufacturing capability. GaN power epitaxy is primarily based on GaN-on-Si platforms and is being driven by demand from fast chargers, data-center power supplies, solar and energy storage systems, electric vehicles and industrial power electronics. This segment is moving toward 8-inch compatible manufacturing, higher voltage platforms and improved reliability. GaN RF epitaxy is more dependent on GaN-on-SiC, where the thermal conductivity and high-frequency performance of SiC make it well suited for 5G infrastructure, satellite communications, radar and defense electronics. AlN and AlGaIn deep-UV epitaxy remains a smaller but technically demanding segment, where commercialization depends on crystal quality, p-type doping, light extraction and end-market adoption. From a demand perspective, III-nitride epitaxy has expanded beyond traditional LED lighting and display applications into Micro LEDs, laser diodes, GaN power devices, GaN RF devices and deep-UV devices. The conventional LED market is relatively mature but still provides a large and stable volume base. Micro LEDs require higher wavelength consistency, lower defect density and better wafer-level uniformity, making them an important proving ground for advanced epitaxial capability. GaN power devices are benefiting from the need for higher-frequency, higher-efficiency and more compact power conversion systems, creating a major growth opportunity for GaN-on-Si epitaxial wafers. GaN RF devices remain attractive in base stations, radar, satellite communications and high-end RF front ends due to their high power density, high-frequency performance and thermal reliability. Future growth in III-nitride epitaxy will therefore be driven by multiple high-value applications rather than a single end market. From a technology roadmap perspective, III-nitride epitaxy is evolving toward substrate diversification, larger wafer formats, lower defect density and closer integration with device design. GaN-on-sapphire remains the mainstream platform for LEDs and parts of the Micro LED market. GaN-on-Si continues to advance in power devices due to its cost and wafer-size advantages. GaN-on-SiC remains the preferred route for high-end RF

applications because of its thermal and high-frequency performance. GaN-on-GaN and AlN-based epitaxy represent higher-performance but higher-cost pathways for laser diodes, vertical power devices and deep-UV devices. Going forward, competition will shift from simple capacity expansion to a more integrated model based on substrate selection, buffer-layer engineering, epitaxial structure design, device-process compatibility, customer qualification and reliability validation. From an industry outlook perspective, III-nitride epitaxy combines a mature volume base with several high-growth technology segments. LED epitaxy is already in a mature competitive phase with increasing cost pressure, while Micro LED, GaN power, GaN RF and AlN/AlGaIn deep-UV epitaxy continue to offer higher growth potential and stronger technology premiums. As end systems move toward higher efficiency, smaller form factors, higher switching frequencies, higher power density and stronger reliability requirements, the strategic importance of III-nitride epitaxial wafers will continue to rise. Companies with multi-substrate platform capabilities, advanced epitaxial design expertise, low-defect mass-production capability and strong co-development relationships with downstream device makers are likely to gain a stronger competitive position over the long term.

This report is a detailed and comprehensive analysis for global Group III-Nitride Epitaxy market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Material System and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Group III-Nitride Epitaxy market size and forecasts, in consumption value (\$ Million), sales quantity (K Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global Group III-Nitride Epitaxy market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global Group III-Nitride Epitaxy market size and forecasts, by Material System and by Application, in consumption value (\$ Million), sales quantity (K Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global Group III-Nitride Epitaxy market shares of main players, shipments in revenue (\$

Million), sales quantity (K Pcs), and ASP (US\$/Pcs), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Group III-Nitride Epitaxy

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Group III-Nitride Epitaxy market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include IQE plc, Soitec, Sumitomo Chemical Group, NTT Advanced Technology Corporation, Enkris Semiconductor, Inc., PAM-XIAMEN, San'an Optoelectronics, Epistar Corporation, Nichia Corporation, ams OSRAM AG, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Group III-Nitride Epitaxy market is split by Material System and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Material System, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Material System

GaN Epitaxy

AlN Epitaxy

InN Epitaxy

InGaN Epitaxy

AlGaN Epitaxy

AlInN / AlGaInN Epitaxy

Other III-Nitride Alloys

Market segment by Substrate Platform

GaN-on-Sapphire

GaN-on-Silicon

GaN-on-SiC

GaN-on-GaN

AlN-on-Sapphire

AlN-on-AlN

III-Nitride-on-Engineered Substrate

Other Substrate Platforms

Market segment by Device Structure

MQW LED Epitaxial Structures

HEMT Epitaxial Structures

p-i-n / Vertical Device Structures

Template Structures

Superlattice / Buffer Structures

Quantum Well / Quantum Barrier Structures

Other Device Structures

Market segment by Application

Microwave RF

Power Electronics

Photoelectric Display

Others

Major players covered

IQE plc

Soitec

Sumitomo Chemical Group

NTT Advanced Technology Corporation

Enkris Semiconductor, Inc.

PAM-XIAMEN

San'an Optoelectronics

Epistar Corporation

Nichia Corporation

ams OSRAM AG

Innoscience

Qorvo, Inc.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Group III-Nitride Epitaxy product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Group III-Nitride Epitaxy, with price, sales quantity, revenue, and global market share of Group III-Nitride Epitaxy from 2021 to 2026.

Chapter 3, the Group III-Nitride Epitaxy competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Group III-Nitride Epitaxy breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Material System and by Application, with sales market share and growth rate by Material System, by Application,

from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Group III-Nitride Epitaxy market forecast, by regions, by Material System, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Group III-Nitride Epitaxy.

Chapter 14 and 15, to describe Group III-Nitride Epitaxy sales channel, distributors, customers, research findings and conclusion.

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