

Global MOCVD Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global MOCVD 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).

MOCVD is a critical tool in the semiconductor industry, used to grow high-quality compound semiconductor layers on substrates with atomic-scale precision. These layers, typically composed of materials such as gallium nitride (GaN), indium phosphide (InP), or gallium arsenide (GaAs), form the foundation for a wide range of electronic and optoelectronic devices. By precisely controlling factors such as layer thickness, composition, and doping, MOCVD enables the production of highly efficient and reliable devices.

MOCVD finds applications in multiple fields, including light-emitting diodes (LEDs), laser diodes, and power electronics. In the LED sector, MOCVD is the primary method for creating epitaxial layers that determine brightness, colour quality, and energy efficiency. For power electronics, it enables the growth of GaN layers used in high-voltage transistors, electric vehicles, and renewable energy systems. MOCVD is also essential for producing vertical-cavity surface-emitting lasers (VCSELs) and other laser diodes that are widely used in communication, sensing, and industrial applications.

The MOCVD process involves introducing metal-organic precursors and hydride gases into a heated reactor chamber, where they decompose and deposit as crystalline layers on a substrate. Maintaining precise control over temperature, gas flow, and pressure is crucial to achieve uniform, defect-free layers. Modern MOCVD systems often include multi-wafer reactors, automated substrate handling, and real-time process monitoring, which significantly improve productivity and consistency.

As a core technology in the semiconductor industry, MOCVD directly impacts device performance, efficiency, and reliability. Its role continues to expand as demand grows for energy-efficient lighting, high-speed optical communication, and advanced power electronics, making it a cornerstone of modern electronics manufacturing.

In 2025, global MOCVD production reached 227 units, with an average selling price of USD 2,157 thousand per unit.

MOCVD sits at the core of the compound semiconductor manufacturing chain. Its value is primarily reflected in high-precision control of epitaxial layer thickness, composition, and doping, which ultimately determines device uniformity, yield, and performance limits. Long-term demand is driven by three main tracks: displays and lighting upgrading from conventional LEDs toward Mini/Micro LED and premium backlight; lasers and optical communications expanding with data centre interconnect, 3D sensing, and industrial processing; and GaN power and RF devices penetrating fast charging, automotive electrification, energy infrastructure, and communications. While the industry exhibits cyclical fluctuations tied to downstream capacity cycles and capex cadence, the medium-to-long-term trajectory remains structurally positive, with incremental demand increasingly driven by high-end epitaxy and new application adoption that triggers capacity expansion and equipment replacement.

From a regional perspective, demand and installed base generally follow downstream epitaxy and device manufacturing clusters. East Asia typically shows higher line density and stronger expansion elasticity across LED, display, and parts of the power/RF value chain. North America and Europe tend to be more influenced by high-end laser, R&D, and selected power/RF directions, where process iteration and technology upgrades play a larger role. On the supply side, manufacturing and delivery are also geographically concentrated. Given the dependence on critical components and accumulated process know-how, entry barriers are high and customer qualification cycles are long, making regional structure closely linked to suppliers' service coverage, spare parts systems, and local engineering support.

In terms of product structure and application structure, the mainstream segmentation can be mapped clearly by material system and target device. Nitride-focused platforms mainly serve LED and GaN power/RF epitaxy, while GaAs/InP-focused platforms primarily address lasers, optical communication devices, and certain RF devices. Requirements vary significantly by application: LED and display emphasise mass-production consistency, throughput per reactor, and overall yield; lasers and optical communications stress composition and interface control, defect density, and

repeatability; power and RF place higher demands on thick epitaxy, stress management, and doping uniformity. As a result, platform-based products coexist with application-driven customisation, and leading suppliers typically pursue a roadmap of a general platform plus application process modules to broaden coverage while improving delivery efficiency.

From a cost and manufacturing standpoint, system cost is typically distributed across the reactor and chamber system, gas delivery and safety, vacuum and thermal management, RF and electrical control, automated wafer handling and software, and metrology or in-situ monitoring modules. Critical components such as mass flow control, vacuum parts, heating and consumables, sensors, and control software can materially impact lead time and cost structure. Industry gross margin is around 40 percent, commonly in the 38 to 42 percent range, shaped by product mix, degree of customisation, aftermarket value from service and spares, and the depth of supply chain localisation. Manufacturing operations are largely based on assembly integration and system tuning, with single-line capacity typically at 10 to 40 tools per year, depending on platform complexity, availability of key parts, commissioning cadence, and customer acceptance timelines.

Regarding value chain structure and competitive landscape, upstream includes specialty gases and precursors, critical components and material parts, precision machining, and subsystem integration. Midstream comprises equipment suppliers' platform development, process packages, delivery, and service. Downstream consists of epitaxy and device manufacturers' volume production and process iteration. Competition is characterised by high concentration driven by technology and qualification: leading players maintain dominance through long-term process know-how, customer certifications, and global service networks; second-tier suppliers often enter via specific material systems or niche applications and then seek scale-up. Meanwhile, increasing customer focus on supply chain security and delivery controllability is making localisation, spare parts ecosystems, and field engineering capability more decisive competitive factors.

Looking ahead, technology evolution will continue to centre on larger wafer capability and higher throughput, tighter process windows, in-situ monitoring and closed-loop control, and platform modularisation. On the application side, the direction is toward higher-end displays, higher-performance lasers and optical communications, and power/RF devices moving to higher voltage and higher reliability. Future incremental growth is more likely to come from new applications that create new process windows rather than pure replacement demand. Accordingly, the ability to replicate capabilities

across material systems, process packages, yield ramp, and full lifecycle service will be a key determinant of share gains in the next expansion cycle.

This report studies the global MOCVD production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global MOCVD 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 Instruments, Taiyo Nippon Sanso, NuFlare Technology, LanheTek, 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 MOCVD 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 MOCVD Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global MOCVD Market, Segmentation by Type:

GaN-based MOCVD

GaAs/InP-based MOCVD

Global MOCVD Market, Segmentation by Substrate/Wafer Diameter:

?2 inch

3–4 inch

6 inch

8 inch

Global MOCVD Market, Segmentation by Chamber Count:

Single-chamber

Dual-chamber

Multi-chamber

Global MOCVD Market, Segmentation by Application:

LED

Power Devices

Lasers

RF Devices

Others

Companies Profiled:

AIXTRON Technologies

Advanced Micro-Fabrication Equipment

Topecsh

Veeco Instruments

Taiyo Nippon Sanso

NuFlare Technology

LanheTek

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

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

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

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

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

4.5 China Based MOCVD Manufacturers and Market Share

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

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

4.5.3 China Based Manufacturers MOCVD Production (2021-2026)

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

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

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

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

5 MARKET ANALYSIS BY TYPE

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

5.2 Segment Introduction by Type

5.2.1 GaN-based MOCVD

5.2.2 GaAs/InP-based MOCVD

5.3 Market Segment by Type

5.3.1 World MOCVD Production by Type (2021-2032)

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

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

6 MARKET ANALYSIS BY SUBSTRATE/WAFER DIAMETER

6.1 World MOCVD 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 MOCVD Production by Substrate/Wafer Diameter (2021-2032)

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

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

7 MARKET ANALYSIS BY CHAMBER COUNT

7.1 World MOCVD 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 MOCVD Production by Chamber Count (2021-2032)
- 7.3.2 World MOCVD Production Value by Chamber Count (2021-2032)
- 7.3.3 World MOCVD Average Price by Chamber Count (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World MOCVD 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 Others

8.3 Market Segment by Application

- 8.3.1 World MOCVD Production by Application (2021-2032)
- 8.3.2 World MOCVD Production Value by Application (2021-2032)
- 8.3.3 World MOCVD 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 MOCVD Product and Services
- 9.1.4 AIXTRON Technologies MOCVD 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 MOCVD Product and Services
- 9.2.4 Advanced Micro-Fabrication Equipment MOCVD 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 MOCVD Product and Services
 - 9.3.4 Topecsh MOCVD 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 Instruments
 - 9.4.1 Veeco Instruments Details
 - 9.4.2 Veeco Instruments Major Business
 - 9.4.3 Veeco Instruments MOCVD Product and Services
 - 9.4.4 Veeco Instruments MOCVD Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 Veeco Instruments Recent Developments/Updates
 - 9.4.6 Veeco Instruments 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 MOCVD Product and Services
 - 9.5.4 Taiyo Nippon Sanso MOCVD 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 MOCVD Product and Services
 - 9.6.4 NuFlare Technology MOCVD 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
- 9.7 LanheTek
 - 9.7.1 LanheTek Details
 - 9.7.2 LanheTek Major Business
 - 9.7.3 LanheTek MOCVD Product and Services
 - 9.7.4 LanheTek MOCVD Production, Price, Value, Gross Margin and Market Share

(2021-2026)

9.7.5 LanheTek Recent Developments/Updates

9.7.6 LanheTek Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 MOCVD Industry Chain

10.2 MOCVD Upstream Analysis

10.2.1 MOCVD Core Raw Materials

10.2.2 Main Manufacturers of MOCVD Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 MOCVD Production Mode

10.6 MOCVD Procurement Model

10.7 MOCVD Industry Sales Model and Sales Channels

10.7.1 MOCVD Sales Model

10.7.2 MOCVD 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 MOCVD Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World MOCVD Production Value by Region (2021-2026) & (USD Million)
- Table 3. World MOCVD Production Value by Region (2027-2032) & (USD Million)
- Table 4. World MOCVD Production Value Market Share by Region (2021-2026)
- Table 5. World MOCVD Production Value Market Share by Region (2027-2032)
- Table 6. World MOCVD Production by Region (2021-2026) & (Units)
- Table 7. World MOCVD Production by Region (2027-2032) & (Units)
- Table 8. World MOCVD Production Market Share by Region (2021-2026)
- Table 9. World MOCVD Production Market Share by Region (2027-2032)
- Table 10. World MOCVD Average Price by Region (2021-2026) & (K US\$/Unit)
- Table 11. World MOCVD Average Price by Region (2027-2032) & (K US\$/Unit)
- Table 12. MOCVD Major Market Trends
- Table 13. World MOCVD Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)
- Table 14. World MOCVD Consumption by Region (2021-2026) & (Units)
- Table 15. World MOCVD Consumption Forecast by Region (2027-2032) & (Units)
- Table 16. World MOCVD Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key MOCVD Producers in 2025
- Table 18. World MOCVD Production by Manufacturer (2021-2026) & (Units)
- Table 19. Production Market Share of Key MOCVD Producers in 2025
- Table 20. World MOCVD Average Price by Manufacturer (2021-2026) & (K US\$/Unit)
- Table 21. Global MOCVD Company Evaluation Quadrant
- Table 22. World MOCVD Industry Rank of Major Manufacturers, Based on Production Value in 2025
- Table 23. Head Office and MOCVD Production Site of Key Manufacturer
- Table 24. MOCVD Market: Company Product Type Footprint
- Table 25. MOCVD Market: Company Product Application Footprint
- Table 26. MOCVD Competitive Factors
- Table 27. MOCVD New Entrant and Capacity Expansion Plans
- Table 28. MOCVD Mergers & Acquisitions Activity
- Table 29. United States VS China MOCVD Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
- Table 30. United States VS China MOCVD Production Comparison, (2021 & 2025 &

2032) & (Units)

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Table 54. World MOCVD Production Value by Substrate/Wafer Diameter, (USD Million),

2021 & 2025 & 2032

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Table 74. World MOCVD 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 MOCVD Product and Services

Table 78. AIXTRON Technologies MOCVD 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 MOCVD Product and Services

Table 84. Advanced Micro-Fabrication Equipment MOCVD 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 MOCVD Product and Services

Table 90. Topecsh MOCVD 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 Instruments Basic Information, Manufacturing Base and Competitors

Table 94. Veeco Instruments Major Business

Table 95. Veeco Instruments MOCVD Product and Services

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

Table 97. Veeco Instruments Recent Developments/Updates

Table 98. Veeco Instruments 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 MOCVD Product and Services

Table 102. Taiyo Nippon Sanso MOCVD 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 MOCVD Product and Services

Table 108. NuFlare Technology MOCVD 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. LanheTek Basic Information, Manufacturing Base and Competitors
- Table 112. LanheTek Major Business
- Table 113. LanheTek MOCVD Product and Services
- Table 114. LanheTek MOCVD Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 115. LanheTek Recent Developments/Updates
- Table 116. LanheTek Competitive Strengths & Weaknesses
- Table 117. Global Key Players of MOCVD Upstream (Raw Materials)
- Table 118. Global MOCVD Typical Customers
- Table 119. MOCVD Typical Distributors

List Of Figures

LIST OF FIGURES

- Figure 1. MOCVD Picture
- Figure 2. World MOCVD Production Value: 2021 & 2025 & 2032, (USD Million)
- Figure 3. World MOCVD Production Value and Forecast (2021-2032) & (USD Million)
- Figure 4. World MOCVD Production (2021-2032) & (Units)
- Figure 5. World MOCVD Average Price (2021-2032) & (K US\$/Unit)
- Figure 6. World MOCVD Production Value Market Share by Region (2021-2032)
- Figure 7. World MOCVD Production Market Share by Region (2021-2032)
- Figure 8. North America MOCVD Production (2021-2032) & (Units)
- Figure 9. Europe MOCVD Production (2021-2032) & (Units)
- Figure 10. China MOCVD Production (2021-2032) & (Units)
- Figure 11. Japan MOCVD Production (2021-2032) & (Units)
- Figure 12. MOCVD Market Drivers
- Figure 13. Factors Affecting Demand
- Figure 14. World MOCVD Consumption (2021-2032) & (Units)
- Figure 15. World MOCVD Consumption Market Share by Region (2021-2032)
- Figure 16. United States MOCVD Consumption (2021-2032) & (Units)
- Figure 17. China MOCVD Consumption (2021-2032) & (Units)
- Figure 18. Europe MOCVD Consumption (2021-2032) & (Units)
- Figure 19. Japan MOCVD Consumption (2021-2032) & (Units)
- Figure 20. South Korea MOCVD Consumption (2021-2032) & (Units)
- Figure 21. ASEAN MOCVD Consumption (2021-2032) & (Units)
- Figure 22. India MOCVD Consumption (2021-2032) & (Units)
- Figure 23. Producer Shipments of MOCVD by Manufacturer Revenue (\$MM) and Market Share (%): 2025
- Figure 24. Global Four-firm Concentration Ratios (CR4) for MOCVD Markets in 2025
- Figure 25. Global Four-firm Concentration Ratios (CR8) for MOCVD Markets in 2025
- Figure 26. United States VS China: MOCVD Production Value Market Share Comparison (2021 & 2025 & 2032)
- Figure 27. United States VS China: MOCVD Production Market Share Comparison (2021 & 2025 & 2032)
- Figure 28. United States VS China: MOCVD Consumption Market Share Comparison (2021 & 2025 & 2032)
- Figure 29. United States Based Manufacturers MOCVD Production Market Share 2025
- Figure 30. China Based Manufacturers MOCVD Production Market Share 2025
- Figure 31. Rest of World Based Manufacturers MOCVD Production Market Share 2025

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

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

Figure 34. GaN-based MOCVD

Figure 35. GaAs/InP-based MOCVD

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

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

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

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

Figure 40. World MOCVD 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 MOCVD Production Market Share by Substrate/Wafer Diameter (2021-2032)

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

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

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

Figure 49. World MOCVD Production Value Market Share by Chamber Count in 2025

Figure 50. Single-chamber

Figure 51. Dual-chamber

Figure 52. Multi-chamber

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

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

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

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

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

Figure 58. LED

Figure 59. Power Devices

Figure 60. Lasers

Figure 61. RF Devices

Figure 62. Others

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

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

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

Figure 66. MOCVD Industry Chain

Figure 67. MOCVD Procurement Model

Figure 68. MOCVD Sales Model

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

Figure 70. Methodology

Figure 71. Research Process and Data Source

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