

Global Physical Vapor Deposition Equipment for SiC and GaN Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Physical Vapor Deposition Equipment for SiC and GaN market size is expected to reach \$ 2371 million by 2032, rising at a market growth of 7.4% CAGR during the forecast period (2026-2032).

In 2025, global Physical Vapor Deposition Equipment for SiC and GaN production reached approximately 1,215 units with average price of 1.05 million USD/Unit .

Physical Vapor Deposition Equipment for SiC and GaN refers to vacuum thin-film deposition systems used in the fabrication of silicon carbide and gallium nitride semiconductor devices, where materials are physically transferred from solid or vapor sources and deposited onto device wafers to form functional thin films. The equipment is primarily used for frontside metallization, backside metallization, ohmic and Schottky contacts, gate and interconnect metals, barrier or seed layers, carbon protective layers and other functional films required in SiC and GaN device processing. Typical systems integrate high-vacuum process chambers, sputtering or evaporation sources, wafer handling, pre-clean and thermal-conditioning modules, process control and automation. Core specifications include supported wafer diameter, film uniformity, deposition rate, particle performance, vacuum level, wafer temperature capability, film stress and production throughput. This study classifies Physical Vapor Deposition Equipment for SiC and GaN by deposition technology into Magnetron Sputtering PVD Equipment, Ionized PVD Equipment, Evaporation PVD Equipment and Other PVD Equipment, with applications primarily in SiC MOSFETs, SiC diodes, GaN HEMTs, GaN power devices, GaN RF devices and associated compound-semiconductor R&D and production lines.

Key Findings

Magnetron sputtering represents the principal PVD technology route for metallization and functional thin-film formation in SiC and GaN device manufacturing

SiC power-device manufacturing is driving demand for specialized wafer handling backside metallization contact formation and carbon protective-layer deposition

GaN PVD applications are extending from conventional metallization toward contacts functional layers and emerging sputtered compound-semiconductor films

Equipment competition increasingly centers on process stability film uniformity wafer handling productivity and integration of multiple vacuum process modules

Market Trends

Physical Vapor Deposition Equipment for SiC and GaN is evolving from adapted semiconductor PVD platforms toward process architectures specifically optimized for wide-bandgap semiconductor manufacturing. SiC production creates distinctive requirements associated with transparent or semi-transparent wafer handling, wafer bow, thinner processed wafers, backside metallization, high-temperature process compatibility and carbon protection following implantation, while GaN devices require tightly controlled contact metals, gate structures, seed layers and other functional films. Applied Materials has enhanced Endura wafer handling for transparent SiC wafers, KLA's SPTS Sigma PVD platform addresses metal deposition for power devices, ULVAC offers dedicated sputtering and evaporation systems within its SiC process portfolio, and Evatec explicitly develops PVD technologies for both SiC and GaN power devices. The broader technology direction is toward cluster-based vacuum integration, lower contamination, tighter film-stress control and greater flexibility in frontside and backside processing. For GaN, PVD is also expanding beyond conventional metal deposition, with development work involving sputtered GaN and lattice-matching or seed-layer processes, indicating potential for PVD to participate in a broader portion of future compound-semiconductor thin-film stacks.

Market Dynamics

Drivers

The major demand driver is the continuing industrialization of SiC and GaN power and RF semiconductor manufacturing. SiC devices require multiple metal and functional-film deposition steps across frontside contacts, backside structures and related interfaces, while increasing wafer diameters and higher-volume production raise requirements for repeatability, automated wafer handling and throughput. KLA describes PVD as an important process for thick frontside conductor layers and multilayer backside metallization in power semiconductor devices, while Evatec positions PVD systems for high-volume production of power transistors and diodes. GaN adds another growth dimension through power electronics and RF applications, where contact formation and other specialized thin films must be deposited with tight control over composition, stress and interface quality. The movement of wide-bandgap devices from specialty production toward increasingly standardized manufacturing therefore supports investment in production-grade PVD platforms rather than laboratory deposition tools alone.

Restraints

Physical Vapor Deposition Equipment for SiC and GaN faces relatively high equipment and process-development barriers. Wide-bandgap wafers can present handling characteristics that differ from conventional silicon, and device performance is sensitive to contact resistance, film adhesion, stress, contamination and thermal history. Process chambers, targets, wafer handling and pre-treatment modules must therefore be optimized around individual film stacks and device architectures, increasing qualification time and engineering cost. Production equipment also requires high vacuum reliability, particle control, preventive maintenance and stable target utilization over long manufacturing cycles. In addition, PVD competes with alternative deposition technologies for selected functional films, meaning the addressable process share depends on material requirements and device design rather than simply on growth in SiC and GaN wafer output.

Opportunities

The most attractive opportunities are associated with expanding SiC wafer production, increasing device complexity and the extension of PVD into additional GaN functional films. SiC manufacturing increasingly requires specialized backside metal stacks,

frontside contact layers and carbon capping or protective deposition, creating opportunities for dedicated modules and multi-chamber platforms. Evatec explicitly identifies PVD solutions for metals, contacts, piezoelectrics and dielectrics in SiC and GaN power devices, while ULVAC combines sputtering and evaporation systems within its power-device process portfolio. For GaN, emerging sputter-based deposition of GaN and lattice-matching or seed layers could broaden the role of PVD beyond metallization if manufacturing performance and economics continue to improve. Another opportunity lies in integrating pre-clean, heating, cooling and multiple deposition modules within cluster architectures, reducing atmospheric exposure between critical process steps and enabling equipment suppliers to capture more value per manufacturing line.

Challenges

The central challenge is converting technically feasible PVD processes into stable, high-yield production recipes across increasingly demanding SiC and GaN device structures. Film thickness, composition, interface cleanliness and stress must remain tightly controlled across the wafer and from lot to lot, while power-device wafers can introduce additional challenges associated with bow, thinning and backside processing. Equipment makers must also support evolving wafer diameters without compromising yield or productivity. In GaN, the range of competing deposition approaches and the diversity of RF and power-device architectures create additional uncertainty regarding which functional layers will ultimately migrate toward sputtering or other PVD methods. Suppliers therefore need strong process-development capability in addition to vacuum-equipment engineering, while customers increasingly evaluate equipment based on demonstrated device-level results, uptime, service response and production economics rather than nominal deposition specifications alone.

Industry Chain Analysis

The upstream industry chain for Physical Vapor Deposition Equipment for SiC and GaN includes vacuum chambers, vacuum pumps, valves, mass-flow and pressure-control components, sputtering cathodes, evaporation sources, RF and DC power supplies, targets and evaporation materials, heaters, electrostatic or mechanical wafer chucks, wafer-transfer robots, sensors and process-control electronics. Semiconductor-grade metal and compound targets are critical consumables because purity, microstructure and target utilization affect film quality and operating cost. The increasing use of cluster architectures also raises the importance of transfer chambers, load locks, pre-clean

modules and integrated vacuum-control systems. KLA's Sigma platform supports integration of pretreatment with PVD within a cluster environment, while ULVAC offers multi-chamber platforms capable of combining PVD with heating, cooling and pre-clean functionality.

Midstream equipment manufacturers create value through vacuum-system design, process-source engineering, wafer handling, film-uniformity control, recipe development and integration of multiple deposition and pretreatment steps. Downstream customers are SiC and GaN wafer fabs, integrated device manufacturers, foundries, compound-semiconductor producers and R&D or pilot facilities. The economic value of equipment is strongly linked to process qualification and installed-base support because customers require stable recipes, spare parts, chamber maintenance and target-management services throughout production. As SiC and GaN manufacturing scales, competitive advantage increasingly depends on the ability to combine equipment reliability with device-specific process expertise and global field-service capability.

Segment Insights

By deposition technology, the Physical Vapor Deposition Equipment for SiC and GaN market is classified into Magnetron Sputtering PVD Equipment, Ionized PVD Equipment, Evaporation PVD Equipment and Other PVD Equipment. Magnetron sputtering forms the broadest technology base because it supports controlled deposition of metals and other functional materials with high uniformity and compatibility with automated semiconductor manufacturing. Production sputtering platforms are widely used for frontside and backside metallization, contact layers, UBM-related structures and other device films. ULVAC's power-device portfolio includes dedicated sputtering systems, while KLA's Sigma PVD platform deposits conductive and insulating layers for semiconductor and power-device applications.

Ionized PVD provides additional control over incoming material flux and step coverage and is valuable where device structures require enhanced bottom or sidewall coverage and lower-temperature processing. Applied Materials' high-ionization PVD technologies illustrate the role of plasma-assisted control in advanced metal deposition. Evaporation remains relevant for selected metal stacks and compound-semiconductor processes where material characteristics, deposition rate or film requirements favor thermal or electron-beam evaporation. The technology mix therefore reflects individual device structures rather than a single universal deposition method, although sputtering remains the most broadly applicable route across SiC and GaN manufacturing.

Downstream Market Opportunities

SiC power devices represent one of the clearest downstream opportunities for Physical Vapor Deposition Equipment for SiC and GaN because MOSFETs, Schottky diodes and related devices require multiple contact and metallization steps, including specialized backside processes. Applied Materials, Evatec, KLA/SPTS and ULVAC have all developed PVD capabilities relevant to power-device processing, demonstrating the increasing equipment intensity of this manufacturing segment. GaN power devices and GaN RF devices provide another opportunity through ohmic contacts, gate metallization and functional-film requirements, while emerging sputtered GaN processes could create additional equipment demand if adopted in production. R&D and pilot lines remain commercially relevant because wide-bandgap semiconductor manufacturers continue to develop new materials, contact schemes and device structures before transferring processes into high-volume manufacturing.

Regional Insights

Asia-Pacific is a strategically important manufacturing region for Physical Vapor Deposition Equipment for SiC and GaN because the region combines significant semiconductor equipment manufacturing capabilities with expanding SiC and GaN device investment. Japan maintains established vacuum and semiconductor-equipment expertise through suppliers such as ULVAC and Canon Anelva, while China has developed domestic PVD equipment capabilities through confirmed suppliers including NAURA, Guangdong Huicheng Vacuum and SJI-SEMI. Taiwan's Skytech also participates in compound-semiconductor PVD equipment. This regional supplier expansion is increasing localization opportunities for wide-bandgap semiconductor production lines while raising competition around cost, delivery lead times and domestic technical support.

North America and Europe maintain strong positions in high-end process equipment and process development. Applied Materials and KLA/SPTS provide semiconductor-scale deposition platforms, while Evatec and Plasma-Therm contribute specialized compound-semiconductor and power-device capabilities. Evatec explicitly addresses SiC and GaN power-device PVD, including emerging GaN deposition processes, demonstrating Europe's continuing role in advanced thin-film development. Regional competition therefore differs in emphasis: North American and European suppliers

generally benefit from process expertise and established semiconductor installed bases, while Asian suppliers increasingly combine local manufacturing, customer proximity and expanding wide-bandgap semiconductor ecosystems.

Competitive Landscape Analysis

The competitive landscape of Physical Vapor Deposition Equipment for SiC and GaN combines large semiconductor capital-equipment companies, established vacuum-technology groups and specialized PVD suppliers. Applied Materials and KLA/SPTS participate through semiconductor-grade PVD platforms and broad installed-base process expertise; Evatec has developed a focused position in thin-film technologies for SiC and GaN power devices; ULVAC combines sputtering, evaporation and other process equipment within a broad power-device portfolio. NAURA, Guangdong Huicheng Vacuum, SJI-SEMI and Skytech broaden the Asian supplier base, while KDF Technologies, PVD Products and Plasma-Therm represent more specialized equipment approaches. Canon Anelva also contributes established semiconductor sputtering capability. Competition is increasingly determined by the ability to handle wide-bandgap wafers reliably, qualify application-specific film stacks, maintain low particles and stable film properties, integrate frontside and backside processes and support customers during production ramps. Large semiconductor-equipment groups benefit from process integration, installed-base service and manufacturing scale, whereas specialist suppliers can differentiate through application flexibility, customized chamber configurations and faster development around specific SiC or GaN processes. As device manufacturing matures, sustained differentiation is likely to depend more on production yield, uptime, process repeatability and total cost of ownership than on basic PVD availability.

Report Scope

This report studies the global Physical Vapor Deposition Equipment for SiC and GaN production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Physical Vapor Deposition Equipment for SiC and GaN 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 Physical Vapor Deposition Equipment for SiC and GaN that contribute to its increasing

demand across many markets.

Highlights and key features of the study

Global Physical Vapor Deposition Equipment for SiC and GaN total production and demand, 2021-2032, (Units)

Global Physical Vapor Deposition Equipment for SiC and GaN total production value, 2021-2032, (USD Million)

Global Physical Vapor Deposition Equipment for SiC and GaN production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Physical Vapor Deposition Equipment for SiC and GaN consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Physical Vapor Deposition Equipment for SiC and GaN domestic production, consumption, key domestic manufacturers and share

Global Physical Vapor Deposition Equipment for SiC and GaN production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Physical Vapor Deposition Equipment for SiC and GaN production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Physical Vapor Deposition Equipment for SiC and GaN production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Physical Vapor Deposition Equipment for SiC and GaN 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 Applied Materials, Inc., Evatec AG, KLA Corporation (SPTS Technologies), NAURA Technology Group Co., Ltd., Guangdong Huicheng Vacuum Technology Co., Ltd., Canon Anelva Corporation, ULVAC, Inc., KDF Technologies, PVD Products, Inc., SJI-SEMI Co., Ltd.,

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 Physical Vapor Deposition Equipment for SiC and GaN 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 Physical Vapor Deposition Equipment for SiC and GaN Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Physical Vapor Deposition Equipment for SiC and GaN Market, Segmentation by Type:

Magnetron Sputtering Systems

Evaporation PVD Systems

Ion-Beam and HiPIMS Systems

Hybrid PVD Systems

Others

Global Physical Vapor Deposition Equipment for SiC and GaN Market, Segmentation by Wafer Size:

Wafer Size 150 mm and Below

200 mm Wafer Systems

300 mm Wafer Systems

Multi-Size Flexible Systems

Others

Global Physical Vapor Deposition Equipment for SiC and GaN Market, Segmentation by Structure:

Cluster PVD Systems

Standalone PVD Systems

In-Line PVD Systems

Global Physical Vapor Deposition Equipment for SiC and GaN Market, Segmentation by Application:

SiC Devices

GaN Devices

Companies Profiled:

Applied Materials, Inc.

Evatec AG

KLA Corporation (SPTS Technologies)

NAURA Technology Group Co., Ltd.

Guangdong Huicheng Vacuum Technology Co., Ltd.

Canon Anelva Corporation

ULVAC, Inc.

KDF Technologies

PVD Products, Inc.

SJI-SEMI Co., Ltd.

Skytech Inc.

Plasma-Therm LLC

Key Questions Answered

1. How big is the global Physical Vapor Deposition Equipment for SiC and GaN market?
2. What is the demand of the global Physical Vapor Deposition Equipment for SiC and GaN market?
3. What is the year over year growth of the global Physical Vapor Deposition Equipment for SiC and GaN market?
4. What is the total value of the global Physical Vapor Deposition Equipment for SiC and GaN market?
5. Who are the Major Players in the global Physical Vapor Deposition Equipment for SiC and GaN market?
6. What are the growth factors driving the market demand?

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