

Global GaN MOCVD Equipment Market Growth 2026-2032

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Abstracts

The global GaN MOCVD Equipment market size is predicted to grow from US\$ 390 million in 2025 to US\$ 653 million in 2032; it is expected to grow at a CAGR of 7.4% from 2026 to 2032.

GaN MOCVD equipment refers to integrated toolsets used to grow III-nitride epitaxial layers on substrates such as sapphire, SiC, silicon, or GaN via metal-organic chemical vapor deposition. A typical tool 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, abatement and safety interlocks, in-situ monitoring and process control software, as well as automation and cleanroom integration, enabling stable control of key epitaxy metrics including thickness, composition, doping, stress, and within-wafer uniformity. In 2025, global production of GaN MOCVD systems reached 185 units, with an average selling price of USD 2.154 million per unit.

GaN MOCVD equipment is a critical-tool segment in compound semiconductors, characterized by high process barriers, long qualification cycles, and project-based deliveries. Industry momentum is closely linked to downstream capacity expansion cycles, qualification windows, and capital spending cadence, leading to phase-driven year-to-year fluctuations. Demand is driven by LED line upgrades and replacement, accelerating penetration of GaN power devices in EV charging, energy storage, and data-center power, and continued adoption of RF devices in high-frequency/high-power applications. Procurement decisions resemble platform introduction and yield-ramp projects, emphasizing particle/defect control, consistency of thermal and flow fields, uptime, and lot-to-lot stability. Supply-side competition centers on system integration, long-term operating stability, and safety/compliance systems, with strong requirements

for on-site delivery and service assurance. Regionally, demand concentrates in clusters with active epitaxy manufacturing and stronger ecosystems, forming a dual-engine pattern where manufacturing bases drive volume tool deployments while R&D centers pull process iteration and platform upgrades. As customers replicate capacity across multiple sites, localized delivery capability, service coverage, and availability of critical spare parts become more important. Product-wise, the market can be tiered by substrate platform (sapphire/SiC/silicon/GaN), wafer size, reactor architecture and wafer-motion scheme, automation level, and in-situ monitoring configuration. R&D and pilot lines prioritize recipe flexibility and fast changeover, while volume production prioritizes yield, uptime, repeatability, and consistency; customers often remain on the same platform when moving from development to production to reduce re-qualification cost and shorten ramp time. Application-wise, LEDs remain a major installed-base driver, power devices continuously raise requirements for low defect density and thick-epi capability, and RF applications emphasize stable, replicable control of uniformity and doping—pushing systems toward tighter thermal uniformity, lower particles, stronger in-situ monitoring, and higher automation. In cost structure, value and cost concentrate in the reactor and chamber, multi-zone thermal management, precursor and high-purity gas delivery and switching, mass-flow and pressure control, vacuum and exhaust handling, abatement and safety interlocks, and process control software with in-situ monitoring. Critical chamber parts, thermal/flow-control subsystems, and abatement units are often the key determinants of performance and delivery cost. On the manufacturing side, single-line capacity defined by assembly, integration, burn-in testing, and factory acceptance is 8–20 tools per year, while actual deliveries are constrained by lead times of critical components, engineering manpower, and customer on-site installation and acceptance scheduling. Sector gross margin is 35%–40%, with profit formation relying on system-level premium and commissioning capability, and more on differentiated process capability and reliability premium than on scale manufacturing alone. Along the value chain, 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 for LEDs and GaN power/RF devices. The competitive landscape is highly concentrated with high switching costs, and barriers to entry arise from process consistency and reliability validation, safety/compliance systems, and on-site delivery and service capability. Looking ahead, tools will continue to evolve toward higher automation, stronger in-situ monitoring, lower particles and defects, higher uptime, and more robust emissions control, while data closed loops and digital operations improve lot-to-lot stability to support more demanding applications and yield targets.

LP Information, Inc. (LPI) ' newest research report, the “GaN MOCVD Equipment Industry Forecast” looks at past sales and reviews total world GaN MOCVD Equipment sales in 2025, providing a comprehensive analysis by region and market sector of projected GaN MOCVD Equipment sales for 2026 through 2032. With GaN MOCVD Equipment sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world GaN MOCVD Equipment industry.

This Insight Report provides a comprehensive analysis of the global GaN MOCVD Equipment landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on GaN MOCVD Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global GaN MOCVD Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for GaN MOCVD Equipment and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global GaN MOCVD Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of GaN MOCVD Equipment market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Horizontal

Rotation & Revolution

Segmentation by Substrate/Wafer Diameter:

?2 inch

3–4 inch

6 inch

8 inch

Segmentation by Chamber Count:

Single-chamber

Dual-chamber

Multi-chamber

Segmentation by Application:

LED

Power Devices

Lasers

RF Devices

Research

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

AIXTRON Technologies

Advanced Micro-Fabrication Equipment

Topecsh

Veeco

Taiyo Nippon Sanso

NuFlare Technology

Key Questions Addressed in this Report

What is the 10-year outlook for the global GaN MOCVD Equipment market?

What factors are driving GaN MOCVD Equipment market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do GaN MOCVD Equipment market opportunities vary by end market size?

How does GaN MOCVD Equipment break out by Type, by Application?

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