

# Global GaN and As/P MOCVD Systems Market Growth 2026-2032

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## Abstracts

The global GaN and As/P MOCVD Systems market size is predicted to grow from US\$ 479 million in 2025 to US\$ 846 million in 2032; it is expected to grow at a CAGR of 8.3% from 2026 to 2032.

GaN and As/P MOCVD Systems refer to integrated MOCVD toolsets used for III-nitride epitaxy (centered on GaN/AlGaIn/InGaIn) and arsenide/phosphide epitaxy (centered on GaAs/InP and related ternary/quaternary compounds), enabling stable control of key epitaxy metrics such as thickness, composition, doping, and within-wafer uniformity on the corresponding substrate platforms. A typical system 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, in-situ monitoring and process control software, safety interlocks, and abatement. In 2025, global combined production of GaN and As/P MOCVD systems totaled 227 units, with an average selling price of USD 2.157 million per unit.

The GaN and As/P MOCVD systems market is a critical-tool segment in compound semiconductors, characterized by small-batch production, high process barriers, and stringent qualification requirements. Demand behaves like project-based capital spending driven by platform introduction and yield ramp, and is tightly correlated with downstream expansion cycles, qualification windows, and capex cadence. Regionally, demand concentrates in clusters with active epitaxy manufacturing and strong device ecosystems, forming a dual-engine pattern where manufacturing sites drive volume platform deployments while R&D centers pull process iteration and platform upgrades; localized delivery and service coverage are increasingly important for share capture. From a product-structure perspective, the two material systems are tiered by substrate platform, reactor architecture and wafer-motion scheme, thermal/flow-field design, and

the level of automation and in-situ monitoring. R&D and pilot lines prioritize recipe flexibility, fast changeover, and process-window exploration, while volume production prioritizes particle/defect control, repeatability, uptime, and lot-to-lot stability; customers often remain on the same platform when moving from development to production to reduce re-qualification cost. Application-wise, GaN systems primarily serve LEDs and GaN power/RF epitaxy, while As/P systems primarily serve lasers/VCSELs, optical communications, and related optoelectronic epitaxy, jointly pushing tools toward lower defects, tighter thermal uniformity, stronger in-situ monitoring, and higher automation. In cost structure, value and cost concentrate in the reactor and chamber, thermal management, precursor delivery and switching, pressure and flow control, vacuum and exhaust handling, safety interlocks and abatement, and process control software with in-situ monitoring; critical chamber parts, control subsystems, and abatement units often determine performance and delivery cost. On the manufacturing side, single-line capacity—defined by assembly, integration, burn-in, and factory acceptance—typically ranges from 6 to 20 tools per year, while actual deliveries are constrained by lead times of critical components, engineering manpower, and customer on-site acceptance scheduling. Sector gross margin is 35%–40%, with profit formation relying on a system-level premium and commissioning capability, complemented by sticky service revenue from spares/consumables, maintenance, upgrades/retrofits, and process support. 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 and the optoelectronic/power/RF device ecosystem. The competitive landscape is highly concentrated with high switching costs, and entry barriers are driven by process consistency and reliability validation, safety compliance, and long-term service delivery. Going forward, systems will continue to evolve toward higher automation, stronger in-situ monitoring, lower particles and defects, higher uptime, and more digitalized operations and data closed loops to improve lot-to-lot stability.

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

This Insight Report provides a comprehensive analysis of the global GaN and As/P

MOCVD Systems 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 and As/P MOCVD Systems portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global GaN and As/P MOCVD Systems market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for GaN and As/P MOCVD Systems 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 and As/P MOCVD Systems.

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

Segmentation by Type:

GaN-based MOCVD

GaAs/InP-based MOCVD

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 and As/P MOCVD Systems market?

What factors are driving GaN and As/P MOCVD Systems market growth, globally and by region?

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

How do GaN and As/P MOCVD Systems market opportunities vary by end market size?

How does GaN and As/P MOCVD Systems break out by Type, by Application?

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