

Global Group III-Nitride Epitaxy Market Growth 2026-2032

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Abstracts

The global Group III-Nitride Epitaxy market size is predicted to grow from US\$ 2397 million in 2025 to US\$ 4865 million in 2032; it is expected to grow at a CAGR of 10.6% from 2026 to 2032.

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 AlGaN 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 AlGaN 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.

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

This Insight Report provides a comprehensive analysis of the global Group III-Nitride Epitaxy 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 Group III-Nitride Epitaxy portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Group III-Nitride Epitaxy market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Group III-Nitride Epitaxy and breaks down the forecast by Material System, 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 Group III-Nitride Epitaxy.

This report presents a comprehensive overview, market shares, and growth

opportunities of Group III-Nitride Epitaxy market by product type, application, key manufacturers and key regions and countries.

Segmentation by Material System:

GaN Epitaxy

AlN Epitaxy

InN Epitaxy

InGaN Epitaxy

AlGaIn Epitaxy

AlInN / AlGaInN Epitaxy

Other III-Nitride Alloys

Segmentation 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

Segmentation 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

Segmentation by Application:

- Microwave RF
- Power Electronics
- Photoelectric Display
- Others

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.

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

Innoscence

Qorvo, Inc.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Group III-Nitride Epitaxy market?

What factors are driving Group III-Nitride Epitaxy market growth, globally and by region?

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

How do Group III-Nitride Epitaxy market opportunities vary by end market size?

How does Group III-Nitride Epitaxy break out by Material System, by Application?

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