

Global MOCVD Precursors Market Growth 2026-2032

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Abstracts

The global MOCVD Precursors market size is predicted to grow from US\$ 557 million in 2025 to US\$ 1228 million in 2032; it is expected to grow at a CAGR of 12.0% from 2026 to 2032.

In 2025, global MOCVD Precursors capacity 30,000 Tons, sales reached approximately 28,650 Tons, with an average market price of around 19,860 USD/Ton, industrial gross margin 41%.

MOCVD Precursors are mission-critical consumables in compound-semiconductor epitaxy, directly affecting film composition, defectivity and production repeatability. This market should not be analyzed as a generic electronic chemicals category. It sits between strategic upstream elements such as gallium, indium, aluminum, arsenic and phosphorus, and downstream epitaxial platforms such as GaN, GaAs, InP, AlGaInP and InGaAs. Once a precursor is qualified in a customer's recipe, reactor platform, yield baseline and reliability flow, supplier switching becomes expensive and risky. The competitive question is therefore not simply whether a supplier can synthesize the molecule; it is whether it can deliver high purity, low impurity drift, stable vapor pressure, reliable packaging, safe logistics and application support over long production cycles.

The competitive landscape of MOCVD Precursors is shaped by global incumbents, regional localization and a clear split between metalorganic sources and hydride specialty gases. On the metalorganic side, representative suppliers include Merck, Nouryon, Lake Materials, Nata Opto-electronic Materials, Vital Materials, Strem, Gelest and EpiValence, while TMA-related suppliers also include ADEKA and Anhui Botai Electronic Materials. On the hydride gas side, Air Liquide, Linde, Entegris, Merck, SK Specialty, Wonik Materials, Taiyo Nippon Sanso, Matheson and Air Products are among the relevant participants. A critical diligence point is that 'semiconductor precursors' or 'ALD/CVD precursors' in corporate disclosures does not automatically mean TMG,

TMA, TMI, arsine or phosphine. Product manufacturers must be separated from brand owners, distributors, gas packagers, delivery-system providers and trading companies.

The core parameters of MOCVD Precursors are purity, impurity profile, vapor-pressure stability, delivery format and safety performance rather than chemical identity alone. For TMG, TMA and TMI, customers typically evaluate 5N, 6N, 6.5N or higher grades, together with oxygen, moisture, silicon, iron, zinc, magnesium, residual carbon and particle contamination. For AsH₃ and PH₃, the focus shifts to electronics-grade purity, metal contaminants, oxygen/moisture control, gas concentration, cylinder pressure and sub-atmospheric or adsorption-based delivery. The technical barrier is built around synthesis, purification, clean filling, container surface treatment and customer-specific process co-optimization. In production environments, batch stability and epiwafer electrical/optical consistency often matter more than headline price.

Demand for MOCVD Precursors is migrating from a historically LED-heavy base toward power, RF, optical communications and advanced display applications. GaN power devices drive TMG and TMA consumption in AlGaIn/GaN HEMT structures; GaAs RF and VCSEL production support demand for TMG, TMA and AsH₃; InP photonics, silicon-photonics integration and high-speed detectors support TMI, PH₃ and AsH₃; Mini LED and Micro LED continue to use TMG, TMA and TMI in nitride and phosphide material systems. Recent industry events are concentrated in two areas: upstream export controls and supply security around gallium, germanium and indium-related materials, and downstream MOCVD tool demand linked to GaN power, optoelectronics and Micro LED. In transactions, Merck's acquisition of Mecaro's chemical business strengthened its semiconductor precursor localization and portfolio depth; Fujifilm's acquisition of Entegris's electronic chemicals business illustrates the same platform logic in adjacent high-purity materials: qualification, purification, regional supply and portfolio breadth are becoming central sources of value.

The market direction for MOCVD Precursors is shifting from product-by-product supply toward integrated competition across materials, packaging, delivery, safety and application support. GaN power, RF front ends, InP photonics and Micro LED will continue to raise the strategic importance of high-purity MOCVD Precursors. Customers are increasingly prioritizing dual sourcing, regional supply, inventory resilience and local technical service. In metalorganics, differentiation will move beyond nominal purity toward defect control, carbon/oxygen memory effects, batch-to-batch repeatability and epi yield contribution. In arsine and phosphine, value will increasingly concentrate around low-pressure delivery, adsorption-based storage, smart monitoring and full-chain

EHS control. As 200 mm GaN, InP photonic integration and Micro LED manufacturing progress, MOCVD Precursors suppliers will capture more value by supporting recipe windows, reactor compatibility and production ramp-up, not just by selling molecules.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for MOCVD Precursors 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 MOCVD Precursors.

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

Segmentation by Type:

TMG (Trimethylgallium)

TMA (Trimethylaluminium)

TMI (Trimethylindium)

AsH₃ (Arsine)

PH3 (Phosphine)

Others

Segmentation by Purity:

5N

6N

Others

Segmentation by Application:

LEDs

Power Devices

RF Devices

Optical Communication

VCSELs

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.

Merck

Air Liquide

SK ecoplant materials

Entegris

Nouryon

Strem Chemicals

Wonik Materials

ADEKA

DNF

Yoke (UP Chemical)

Soulbrain

Nanmat

Natachem

Anhui Botai Electronic Materials

Key Questions Addressed in this Report

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

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

Which technologies are poised for the fastest growth by market and region?
How do MOCVD Precursors market opportunities vary by end market size?
How does MOCVD Precursors break out by Type, by Application?

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