

GaN Substrate Market by Substrate Type (GaN-on-Sapphire, GaN-on-Silicon, GaN-on-SiC, GaN-on-GaN, GaN-on-Diamond), Wafer Size (2-inch, 4-inch, 6-inch, 8-inch), Device Type (Discrete, ICs), Doping Type, Application, End Use - Global Forecast to 2032

<https://marketpublishers.com/r/G721278DEA60EN.html>

Date: July 2026

Pages: 297

Price: US\$ 2,970.00 (Single User License)

ID: G721278DEA60EN

Abstracts

The global GaN substrate market size is projected to grow from USD 0.62 billion in 2026 to USD 1.25 billion by 2032, at a CAGR of 12.5% during the forecast period. The market is witnessing robust growth, owing to the increasing adoption of wide-bandgap semiconductors in high-performance power electronics and RF applications. Rising demand for electric vehicles, 5G infrastructure, renewable energy systems, data centers, and advanced defense technologies is accelerating the deployment of GaN-based devices due to their superior efficiency, higher power density, and faster switching capabilities. Continuous advancements in crystal growth techniques, larger wafer production, and defect reduction are improving substrate quality while lowering manufacturing costs. Key market trends include investments in domestic semiconductor manufacturing, growing adoption of GaN in AI and high-performance computing applications, and strategic collaborations across the semiconductor value chain to strengthen supply resilience and accelerate commercialization of next-generation GaN technologies.

“GaN-on-SiC segment to account for the largest share of the GaN substrate market in 2026”

By substrate type, the GaN-on-SiC segment is projected to hold the largest market share in 2026 due to its superior thermal conductivity, high breakdown voltage, and excellent high-frequency performance. These characteristics make GaN-on-SiC substrates the preferred choice for RF devices and high-power electronics used in

telecommunications, aerospace & defense, industrial systems, and electric vehicles. Continuous advancements in epitaxial growth technologies and wafer quality are further improving device reliability and manufacturing efficiency. Additionally, increasing deployment of 5G infrastructure, satellite communications, and high-power applications is expected to sustain the dominance of the GaN-on-SiC segment during the forecast period.

“8-inch wafer segment to exhibit the highest CAGR in the GaN substrate market during the forecast period”

By wafer size, the 8-inch wafer segment is projected to register the highest CAGR during the forecast period, owing to the semiconductor industry’s transition toward larger-diameter wafers for improved manufacturing efficiency and lower production costs. Compared with smaller wafers, 8-inch GaN substrates enable higher device output per wafer and better compatibility with existing semiconductor fabrication facilities. Investments in large-scale GaN manufacturing for power electronics, AI data centers, automotive electronics, and renewable energy applications are boosting the adoption of 8-inch wafers. Furthermore, continuous advancements in crystal growth technologies and wafer processing are expected to strengthen the commercial adoption of large-diameter GaN substrates globally.

“Asia Pacific to be the fastest-growing region in the GaN substrate market between 2026 and 2032”

Asia Pacific is projected to register the highest CAGR during the forecast period due to rapid expansion of semiconductor manufacturing, increasing investments in electric vehicles, and growing deployment of 5G/6G communication infrastructure. Countries such as China, Japan, South Korea, and Taiwan are strengthening domestic semiconductor ecosystems through substantial investments in advanced materials, wafer manufacturing, and compound semiconductor technologies. The region also benefits from a well-established electronics supply chain, strong government support, and expanding R&D activities. Furthermore, the mounting demand for GaN-based power electronics, RF devices, and optoelectronic applications is expected to accelerate the adoption of GaN substrates across the region.

Breakdown of Primaries

Various executives from key organizations operating in the GaN substrate market were interviewed in-depth, including CEOs, marketing directors, and innovation and

technology directors.

By Company Type: Tier 1–40%, Tier 2–30%, and Tier 3–30%

By Designation: Directors–20%, Managers–10%, and Others–70%

By Region: Asia Pacific–45%, Europe–25%, North America–20%, and RoW–10%

The GaN substrate market is dominated by Sumitomo Chemical Co., Ltd. (Japan), which is followed by Mitsubishi Chemical Corporation (Japan), Shin-Etsu Chemical Co., Ltd. (Japan), SOITEC (France), IQE plc (UK), Wolfspeed Inc. (US), Infineon Technologies AG (Germany), Xiamen Powerway Advanced Material Co., Ltd. (China), NGK Corporation (Japan), and Kyma Technologies (US).

Study Coverage

The report segments the GaN substrate market by substrate type, wafer size, device type, doping type, application, end use, and region. The report also discusses the drivers, restraints, opportunities, and challenges influencing market growth. It provides a detailed view of the market across four major regions—North America, Europe, Asia Pacific, and RoW. In addition, the report includes a value chain analysis, competitive landscape, and company profiles of key market participants operating across the global GaN substrate ecosystem.

Key Benefits of Buying the Report

Analysis of key drivers (Surging adoption of GaN power devices across industrial applications, Growing demand for GaN substrates in 5G and RF applications), restraints (Technical issues associated with GaN substrate manufacturing, Competition from alternate technologies), opportunities (Strong focus on minimizing carbon footprints, Advancements in GaN-on-silicon technology), and challenges (Cost competitiveness against silicon, Complex supply chain and lack of standardization) influencing the growth of the GaN substrate market

Products/Solution/Service Development/Innovation: Detailed insights into upcoming products, research, and development activities in the GaN substrate

market

Market Development: Comprehensive information about lucrative markets—the report analyzes the GaN substrate market across varied regions

Market Diversification: Exhaustive information about GaN substrate in untapped geographies, recent developments, and investments in the GaN substrate market

Competitive Assessment: In-depth assessment of market shares and growth strategies, and offerings of leading players offering components of the GaN substrate market, such as Sumitomo Chemical Co., Ltd. (Japan), Mitsubishi Chemical Corporation (Japan), Shin-Etsu Chemical Co., Ltd. (Japan), IQE plc (UK), and SOITEC (France)

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