

Global SiC and GaN Devices and Modules Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on SiC and GaN Devices and Modules competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Silicon Carbide (SiC) and Gallium Nitride (GaN) devices and modules are the leading wide-bandgap (WBG) power-semiconductor technologies used where higher efficiency, higher switching speed, and better thermal performance than silicon are required. Product definitions & types: SiC product families include SiC Schottky barrier diodes (SBDs), discrete SiC MOSFETs (planar and trench variants), bare dice for module assembly, and integrated SiC power modules (half-bridge, three-level, multichip modules) spanning voltage classes commonly from 600 V up to 3300 V and above. GaN product families include enhancement-mode GaN HEMTs (discrete and integrated), monolithic power stages, GaN power ICs (driver + FET), and GaN-based half-bridge modules ? typically focused on low-to-medium voltage ranges (e.g., 30?900 V) and very high-frequency applications. These device types are sold as bare wafers/dice, discrete packaged parts (TO, DPAK, PQFN, etc.), and module / power-stage assemblies for direct system integration. Applications, value chain & key vendors: SiC is dominant where high voltage, high temperature and highest system efficiency matter ? EV traction inverters, onboard chargers/DC?DC converters, large PV/grid inverters, industrial motor drives and traction/rail. GaN excels where high switching frequency, high power density and low-voltage efficiency are priorities ? fast chargers, server/PoE power supplies, data-center front ends, and point-of-load converters. The industry value chain runs from upstream crystal/substrate growers and epi suppliers (substrates, epi wafers, specialty materials), through midstream device fabs and packaging houses (front-end device process, back-end singulation & module assembly), to downstream OEMs/system integrators (automotive Tier-1s, inverter manufacturers,

server and adapter OEMs). Major SiC players include STMicroelectronics, Infineon, Wolfspeed, ROHM, onsemi and several regional challengers; major GaN players include GaN Systems, EPC, Navitas, Transphorm and established analog houses offering GaN power ICs. Notable strategic moves in 2024-2025 include large 200 mm SiC commercialization and wafer-scale investments, significant foundry/greenfield fab announcements, and expanded supply agreements between device makers and substrate/epi suppliers. Industry status & future trends (concise): The market is in a rapid adoption phase but structurally different for the two technologies: SiC faces upstream substrate/epi capacity constraints and is moving industry-wide toward 200 mm wafer flows to reduce unit costs and scale production; GaN is scaling rapidly at lower voltages with strong adoption in chargers, data-center and consumer power supplies thanks to high-frequency advantages. Expect multi-year double-digit CAGR in both SiC and GaN end markets (SiC demand particularly tied to EV traction and large inverter adoption), continued verticalization or long-term supply contracts to secure substrate/epi, accelerated packaging/module innovations (embedded die, double-sided cooling, parasitic reduction), and deeper OEM-vendor co-design to extract system-level efficiency gains. Short-term volatility (demand cycles, single-supplier risks) will persist, but the medium-term direction points to broader displacement of silicon in targeted power segments.

The global SiC and GaN Devices and Modules market size was estimated at USD 5279.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 21.00% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global SiC and GaN Devices and Modules market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global SiC and GaN Devices and Modules market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced

understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the SiC and GaN Devices and Modules market.

Global SiC and GaN Devices and Modules Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

onsemi
STMicroelectronics
Infineon (GaN Systems)
Wolfspeed
BYD Semiconductor
Bosch
United Nova Technology
Innoscence
Navitas (GeneSiC)
Guangdong AccoPower Semiconductor
Rohm
San'an Optoelectronics
Efficient Power Conversion Corporation (EPC)
Power Integrations, Inc.
Semikron Danfoss
Mitsubishi Electric

BASiC Semiconductor
Fuji Electric
SemiQ
PN Junction Semiconductor (Hangzhou)
Zhuzhou CRRC Times Electric
InventChip Technology
Microchip (Microsemi)
CETC 55
Toshiba
WeEn Semiconductors
Littelfuse (IXYS)
Renesas Electronics (Transphorm)
Yangzhou Yangjie Electronic Technology
Vishay Intertechnology

Market Segmentation (by Type)

SiC Devices and Modules
GaN Devices and Modules

Market Segmentation (by Application)

Automotive
EV Charging
Industrial Motor/Drive
PV, Energy Storage, Wind Power
UPS, Data Center & Server
Rail Transport
Consumer Electronics
Defence & Aerospace
Others

Geographic Segmentation

North America (USA, Canada, Mexico)
Europe (Germany, UK, France, Russia, Italy, Rest of Europe)
Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)
South America (Brazil, Argentina, Columbia, Rest of South America)
The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of

MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study
Neutral perspective on the market performance
Recent industry trends and developments
Competitive landscape & strategies of key players
Potential & niche segments and regions exhibiting promising growth covered
Historical, current, and projected market size, in terms of value
In-depth analysis of the SiC and GaN Devices and Modules Market
Overview of the regional outlook of the SiC and GaN Devices and Modules Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the SiC and GaN Devices and Modules Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of SiC and GaN Devices and Modules, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

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Contents

1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE

1.1 Market Definition and Statistical Scope of SiC and GaN Devices and Modules

1.2 Key Market Segments

1.2.1 SiC and GaN Devices and Modules Segment by Type

1.2.2 SiC and GaN Devices and Modules Segment by Application

1.3 Methodology & Sources of Information

1.3.1 Research Methodology

1.3.2 Research Process

1.3.3 Market Breakdown and Data Triangulation

1.3.4 Base Year

1.3.5 Report Assumptions & Caveats

2 SiC AND GaN DEVICES AND MODULES MARKET OVERVIEW

2.1 Global Market Overview

2.1.1 Global SiC and GaN Devices and Modules Market Size (M USD) Estimates and Forecasts (2020-2035)

2.1.2 Global SiC and GaN Devices and Modules Sales Estimates and Forecasts (2020-2035)

2.2 Market Segment Executive Summary

2.3 Global Market Size by Region

3 SiC AND GaN DEVICES AND MODULES MARKET COMPETITIVE LANDSCAPE

3.1 Company Assessment Quadrant

3.2 Global SiC and GaN Devices and Modules Product Life Cycle

3.3 Global SiC and GaN Devices and Modules Sales by Manufacturers (2020-2025)

3.4 Global SiC and GaN Devices and Modules Revenue Market Share by Manufacturers (2020-2025)

3.5 SiC and GaN Devices and Modules Market Share by Company Type (Tier 1, Tier 2, and Tier 3)

3.6 Global SiC and GaN Devices and Modules Average Price by Manufacturers (2020-2025)

3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types

3.8 SiC and GaN Devices and Modules Market Competitive Situation and Trends

3.8.1 SiC and GaN Devices and Modules Market Concentration Rate

3.8.2 Global 5 and 10 Largest SiC and GaN Devices and Modules Players Market Share by Revenue

3.8.3 Mergers & Acquisitions, Expansion

4 SIC AND GAN DEVICES AND MODULES INDUSTRY CHAIN ANALYSIS

4.1 SiC and GaN Devices and Modules Industry Chain Analysis

4.2 Market Overview of Key Raw Materials

4.3 Midstream Market Analysis

4.4 Downstream Customer Analysis

5 THE DEVELOPMENT AND DYNAMICS OF SIC AND GAN DEVICES AND MODULES MARKET

5.1 Key Development Trends

5.2 Driving Factors

5.3 Market Challenges

5.4 Industry News

5.4.1 New Product Developments

5.4.2 Mergers & Acquisitions

5.4.3 Expansions

5.4.4 Collaboration/Supply Contracts

5.5 PEST Analysis

5.5.1 Industry Policies Analysis

5.5.2 Economic Environment Analysis

5.5.3 Social Environment Analysis

5.5.4 Technological Environment Analysis

5.6 Global SiC and GaN Devices and Modules Market Porter's Five Forces Analysis

5.6.1 Global Trade Frictions

5.6.2 U.S. Tariff Policy ? April 2025

5.6.3 Global Trade Frictions and Their Impacts to SiC and GaN Devices and Modules Market

5.7 ESG Ratings of Leading Companies

6 SIC AND GAN DEVICES AND MODULES MARKET SEGMENTATION BY TYPE

6.1 Evaluation Matrix of Segment Market Development Potential (Type)

6.2 Global SiC and GaN Devices and Modules Sales Market Share by Type (2020-2025)

6.3 Global SiC and GaN Devices and Modules Market Size by Type (2020-2025)

6.4 Global SiC and GaN Devices and Modules Price by Type (2020-2025)

7 SIC AND GAN DEVICES AND MODULES MARKET SEGMENTATION BY APPLICATION

7.1 Evaluation Matrix of Segment Market Development Potential (Application)

7.2 Global SiC and GaN Devices and Modules Market Sales by Application (2020-2025)

7.3 Global SiC and GaN Devices and Modules Market Size (M USD) by Application (2020-2025)

7.4 Global SiC and GaN Devices and Modules Sales Growth Rate by Application (2020-2025)

8 SIC AND GAN DEVICES AND MODULES MARKET SALES BY REGION

8.1 Global SiC and GaN Devices and Modules Sales by Region

8.1.1 Global SiC and GaN Devices and Modules Sales by Region

8.1.2 Global SiC and GaN Devices and Modules Sales Market Share by Region

8.2 Global SiC and GaN Devices and Modules Market Size by Region

8.2.1 Global SiC and GaN Devices and Modules Market Size by Region

8.2.2 Global SiC and GaN Devices and Modules Market Size by Region

8.3 North America

8.3.1 North America SiC and GaN Devices and Modules Sales by Country

8.3.2 North America SiC and GaN Devices and Modules Market Size by Country

8.3.3 U.S. Market Overview

8.3.4 Canada Market Overview

8.3.5 Mexico Market Overview

8.4 Europe

8.4.1 Europe SiC and GaN Devices and Modules Sales by Country

8.4.2 Europe SiC and GaN Devices and Modules Market Size by Country

8.4.3 Germany Market Overview

8.4.4 France Market Overview

8.4.5 U.K. Market Overview

8.4.6 Italy Market Overview

8.4.7 Spain Market Overview

8.5 Asia Pacific

8.5.1 Asia Pacific SiC and GaN Devices and Modules Sales by Region

8.5.2 Asia Pacific SiC and GaN Devices and Modules Market Size by Region

8.5.3 China Market Overview

- 8.5.4 Japan Market Overview
- 8.5.5 South Korea Market Overview
- 8.5.6 India Market Overview
- 8.5.7 Southeast Asia Market Overview
- 8.6 South America
 - 8.6.1 South America SiC and GaN Devices and Modules Sales by Country
 - 8.6.2 South America SiC and GaN Devices and Modules Market Size by Country
 - 8.6.3 Brazil Market Overview
 - 8.6.4 Argentina Market Overview
 - 8.6.5 Columbia Market Overview
- 8.7 Middle East and Africa
 - 8.7.1 Middle East and Africa SiC and GaN Devices and Modules Sales by Region
 - 8.7.2 Middle East and Africa SiC and GaN Devices and Modules Market Size by Region
 - 8.7.3 Saudi Arabia Market Overview
 - 8.7.4 UAE Market Overview
 - 8.7.5 Egypt Market Overview
 - 8.7.6 Nigeria Market Overview
 - 8.7.7 South Africa Market Overview

9 SiC AND GAN DEVICES AND MODULES MARKET PRODUCTION BY REGION

- 9.1 Global Production of SiC and GaN Devices and Modules by Region(2020-2025)
- 9.2 Global SiC and GaN Devices and Modules Revenue Market Share by Region (2020-2025)
- 9.3 Global SiC and GaN Devices and Modules Production, Revenue, Price and Gross Margin (2020-2025)
- 9.4 North America SiC and GaN Devices and Modules Production
 - 9.4.1 North America SiC and GaN Devices and Modules Production Growth Rate (2020-2025)
 - 9.4.2 North America SiC and GaN Devices and Modules Production, Revenue, Price and Gross Margin (2020-2025)
- 9.5 Europe SiC and GaN Devices and Modules Production
 - 9.5.1 Europe SiC and GaN Devices and Modules Production Growth Rate (2020-2025)
 - 9.5.2 Europe SiC and GaN Devices and Modules Production, Revenue, Price and Gross Margin (2020-2025)
- 9.6 Japan SiC and GaN Devices and Modules Production (2020-2025)
 - 9.6.1 Japan SiC and GaN Devices and Modules Production Growth Rate (2020-2025)
 - 9.6.2 Japan SiC and GaN Devices and Modules Production, Revenue, Price and

Gross Margin (2020-2025)

9.7 China SiC and GaN Devices and Modules Production (2020-2025)

9.7.1 China SiC and GaN Devices and Modules Production Growth Rate (2020-2025)

9.7.2 China SiC and GaN Devices and Modules Production, Revenue, Price and Gross Margin (2020-2025)

10 KEY COMPANIES PROFILE

10.1 onsemi

10.1.1 onsemi Basic Information

10.1.2 onsemi SiC and GaN Devices and Modules Product Overview

10.1.3 onsemi SiC and GaN Devices and Modules Product Market Performance

10.1.4 onsemi Business Overview

10.1.5 onsemi SWOT Analysis

10.1.6 onsemi Recent Developments

10.2 STMicroelectronics

10.2.1 STMicroelectronics Basic Information

10.2.2 STMicroelectronics SiC and GaN Devices and Modules Product Overview

10.2.3 STMicroelectronics SiC and GaN Devices and Modules Product Market Performance

10.2.4 STMicroelectronics Business Overview

10.2.5 STMicroelectronics SWOT Analysis

10.2.6 STMicroelectronics Recent Developments

10.3 Infineon (GaN Systems)

10.3.1 Infineon (GaN Systems) Basic Information

10.3.2 Infineon (GaN Systems) SiC and GaN Devices and Modules Product Overview

10.3.3 Infineon (GaN Systems) SiC and GaN Devices and Modules Product Market Performance

10.3.4 Infineon (GaN Systems) Business Overview

10.3.5 Infineon (GaN Systems) SWOT Analysis

10.3.6 Infineon (GaN Systems) Recent Developments

10.4 Wolfspeed

10.4.1 Wolfspeed Basic Information

10.4.2 Wolfspeed SiC and GaN Devices and Modules Product Overview

10.4.3 Wolfspeed SiC and GaN Devices and Modules Product Market Performance

10.4.4 Wolfspeed Business Overview

10.4.5 Wolfspeed Recent Developments

10.5 BYD Semiconductor

10.5.1 BYD Semiconductor Basic Information

- 10.5.2 BYD Semiconductor SiC and GaN Devices and Modules Product Overview
- 10.5.3 BYD Semiconductor SiC and GaN Devices and Modules Product Market Performance
- 10.5.4 BYD Semiconductor Business Overview
- 10.5.5 BYD Semiconductor Recent Developments
- 10.6 Bosch
 - 10.6.1 Bosch Basic Information
 - 10.6.2 Bosch SiC and GaN Devices and Modules Product Overview
 - 10.6.3 Bosch SiC and GaN Devices and Modules Product Market Performance
 - 10.6.4 Bosch Business Overview
 - 10.6.5 Bosch Recent Developments
- 10.7 United Nova Technology
 - 10.7.1 United Nova Technology Basic Information
 - 10.7.2 United Nova Technology SiC and GaN Devices and Modules Product Overview
 - 10.7.3 United Nova Technology SiC and GaN Devices and Modules Product Market Performance
 - 10.7.4 United Nova Technology Business Overview
 - 10.7.5 United Nova Technology Recent Developments
- 10.8 Innoscience
 - 10.8.1 Innoscience Basic Information
 - 10.8.2 Innoscience SiC and GaN Devices and Modules Product Overview
 - 10.8.3 Innoscience SiC and GaN Devices and Modules Product Market Performance
 - 10.8.4 Innoscience Business Overview
 - 10.8.5 Innoscience Recent Developments
- 10.9 Navitas (GeneSiC)
 - 10.9.1 Navitas (GeneSiC) Basic Information
 - 10.9.2 Navitas (GeneSiC) SiC and GaN Devices and Modules Product Overview
 - 10.9.3 Navitas (GeneSiC) SiC and GaN Devices and Modules Product Market Performance
 - 10.9.4 Navitas (GeneSiC) Business Overview
 - 10.9.5 Navitas (GeneSiC) Recent Developments
- 10.10 Guangdong AccoPower Semiconductor
 - 10.10.1 Guangdong AccoPower Semiconductor Basic Information
 - 10.10.2 Guangdong AccoPower Semiconductor SiC and GaN Devices and Modules Product Overview
 - 10.10.3 Guangdong AccoPower Semiconductor SiC and GaN Devices and Modules Product Market Performance
 - 10.10.4 Guangdong AccoPower Semiconductor Business Overview
 - 10.10.5 Guangdong AccoPower Semiconductor Recent Developments

10.11 Rohm

10.11.1 Rohm Basic Information

10.11.2 Rohm SiC and GaN Devices and Modules Product Overview

10.11.3 Rohm SiC and GaN Devices and Modules Product Market Performance

10.11.4 Rohm Business Overview

10.11.5 Rohm Recent Developments

10.12 San'an Optoelectronics

10.12.1 San'an Optoelectronics Basic Information

10.12.2 San'an Optoelectronics SiC and GaN Devices and Modules Product Overview

10.12.3 San'an Optoelectronics SiC and GaN Devices and Modules Product Market

Performance

10.12.4 San'an Optoelectronics Business Overview

10.12.5 San'an Optoelectronics Recent Developments

10.13 Efficient Power Conversion Corporation (EPC)

10.13.1 Efficient Power Conversion Corporation (EPC) Basic Information

10.13.2 Efficient Power Conversion Corporation (EPC) SiC and GaN Devices and

Modules Product Overview

10.13.3 Efficient Power Conversion Corporation (EPC) SiC and GaN Devices and

Modules Product Market Performance

10.13.4 Efficient Power Conversion Corporation (EPC) Business Overview

10.13.5 Efficient Power Conversion Corporation (EPC) Recent Developments

10.14 Power Integrations, Inc.

10.14.1 Power Integrations, Inc. Basic Information

10.14.2 Power Integrations, Inc. SiC and GaN Devices and Modules Product Overview

10.14.3 Power Integrations, Inc. SiC and GaN Devices and Modules Product Market

Performance

10.14.4 Power Integrations, Inc. Business Overview

10.14.5 Power Integrations, Inc. Recent Developments

10.15 Semikron Danfoss

10.15.1 Semikron Danfoss Basic Information

10.15.2 Semikron Danfoss SiC and GaN Devices and Modules Product Overview

10.15.3 Semikron Danfoss SiC and GaN Devices and Modules Product Market

Performance

10.15.4 Semikron Danfoss Business Overview

10.15.5 Semikron Danfoss Recent Developments

10.16 Mitsubishi Electric

10.16.1 Mitsubishi Electric Basic Information

10.16.2 Mitsubishi Electric SiC and GaN Devices and Modules Product Overview

10.16.3 Mitsubishi Electric SiC and GaN Devices and Modules Product Market

Performance

10.16.4 Mitsubishi Electric Business Overview

10.16.5 Mitsubishi Electric Recent Developments

10.17 BASiC Semiconductor

10.17.1 BASiC Semiconductor Basic Information

10.17.2 BASiC Semiconductor SiC and GaN Devices and Modules Product Overview

10.17.3 BASiC Semiconductor SiC and GaN Devices and Modules Product Market

Performance

10.17.4 BASiC Semiconductor Business Overview

10.17.5 BASiC Semiconductor Recent Developments

10.18 Fuji Electric

10.18.1 Fuji Electric Basic Information

10.18.2 Fuji Electric SiC and GaN Devices and Modules Product Overview

10.18.3 Fuji Electric SiC and GaN Devices and Modules Product Market Performance

10.18.4 Fuji Electric Business Overview

10.18.5 Fuji Electric Recent Developments

10.19 SemiQ

10.19.1 SemiQ Basic Information

10.19.2 SemiQ SiC and GaN Devices and Modules Product Overview

10.19.3 SemiQ SiC and GaN Devices and Modules Product Market Performance

10.19.4 SemiQ Business Overview

10.19.5 SemiQ Recent Developments

10.20 PN Junction Semiconductor (Hangzhou)

10.20.1 PN Junction Semiconductor (Hangzhou) Basic Information

10.20.2 PN Junction Semiconductor (Hangzhou) SiC and GaN Devices and Modules

Product Overview

10.20.3 PN Junction Semiconductor (Hangzhou) SiC and GaN Devices and Modules

Product Market Performance

10.20.4 PN Junction Semiconductor (Hangzhou) Business Overview

10.20.5 PN Junction Semiconductor (Hangzhou) Recent Developments

10.21 Zhuzhou CRRC Times Electric

10.21.1 Zhuzhou CRRC Times Electric Basic Information

10.21.2 Zhuzhou CRRC Times Electric SiC and GaN Devices and Modules Product Overview

10.21.3 Zhuzhou CRRC Times Electric SiC and GaN Devices and Modules Product

Market Performance

10.21.4 Zhuzhou CRRC Times Electric Business Overview

10.21.5 Zhuzhou CRRC Times Electric Recent Developments

10.22 InventChip Technology

- 10.22.1 InventChip Technology Basic Information
- 10.22.2 InventChip Technology SiC and GaN Devices and Modules Product Overview
- 10.22.3 InventChip Technology SiC and GaN Devices and Modules Product Market Performance
- 10.22.4 InventChip Technology Business Overview
- 10.22.5 InventChip Technology Recent Developments
- 10.23 Microchip (Microsemi)
 - 10.23.1 Microchip (Microsemi) Basic Information
 - 10.23.2 Microchip (Microsemi) SiC and GaN Devices and Modules Product Overview
 - 10.23.3 Microchip (Microsemi) SiC and GaN Devices and Modules Product Market Performance
 - 10.23.4 Microchip (Microsemi) Business Overview
 - 10.23.5 Microchip (Microsemi) Recent Developments
- 10.24 CETC
 - 10.24.1 CETC 55 Basic Information
 - 10.24.2 CETC 55 SiC and GaN Devices and Modules Product Overview
 - 10.24.3 CETC 55 SiC and GaN Devices and Modules Product Market Performance
 - 10.24.4 CETC 55 Business Overview
 - 10.24.5 CETC 55 Recent Developments
- 10.25 Toshiba
 - 10.25.1 Toshiba Basic Information
 - 10.25.2 Toshiba SiC and GaN Devices and Modules Product Overview
 - 10.25.3 Toshiba SiC and GaN Devices and Modules Product Market Performance
 - 10.25.4 Toshiba Business Overview
 - 10.25.5 Toshiba Recent Developments
- 10.26 WeEn Semiconductors
 - 10.26.1 WeEn Semiconductors Basic Information
 - 10.26.2 WeEn Semiconductors SiC and GaN Devices and Modules Product Overview
 - 10.26.3 WeEn Semiconductors SiC and GaN Devices and Modules Product Market Performance
 - 10.26.4 WeEn Semiconductors Business Overview
 - 10.26.5 WeEn Semiconductors Recent Developments
- 10.27 Littelfuse (IXYS)
 - 10.27.1 Littelfuse (IXYS) Basic Information
 - 10.27.2 Littelfuse (IXYS) SiC and GaN Devices and Modules Product Overview
 - 10.27.3 Littelfuse (IXYS) SiC and GaN Devices and Modules Product Market Performance
 - 10.27.4 Littelfuse (IXYS) Business Overview
 - 10.27.5 Littelfuse (IXYS) Recent Developments

10.28 Renesas Electronics (Transphorm)

10.28.1 Renesas Electronics (Transphorm) Basic Information

10.28.2 Renesas Electronics (Transphorm) SiC and GaN Devices and Modules

Product Overview

10.28.3 Renesas Electronics (Transphorm) SiC and GaN Devices and Modules

Product Market Performance

10.28.4 Renesas Electronics (Transphorm) Business Overview

10.28.5 Renesas Electronics (Transphorm) Recent Developments

10.29 Yangzhou Yangjie Electronic Technology

10.29.1 Yangzhou Yangjie Electronic Technology Basic Information

10.29.2 Yangzhou Yangjie Electronic Technology SiC and GaN Devices and Modules

Product Overview

10.29.3 Yangzhou Yangjie Electronic Technology SiC and GaN Devices and Modules

Product Market Performance

10.29.4 Yangzhou Yangjie Electronic Technology Business Overview

10.29.5 Yangzhou Yangjie Electronic Technology Recent Developments

10.30 Vishay Intertechnology

10.30.1 Vishay Intertechnology Basic Information

10.30.2 Vishay Intertechnology SiC and GaN Devices and Modules Product Overview

10.30.3 Vishay Intertechnology SiC and GaN Devices and Modules Product Market

Performance

10.30.4 Vishay Intertechnology Business Overview

10.30.5 Vishay Intertechnology Recent Developments

11 SiC AND GAN DEVICES AND MODULES MARKET FORECAST BY REGION

11.1 Global SiC and GaN Devices and Modules Market Size Forecast

11.2 Global SiC and GaN Devices and Modules Market Forecast by Region

11.2.1 North America Market Size Forecast by Country

11.2.2 Europe SiC and GaN Devices and Modules Market Size Forecast by Country

11.2.3 Asia Pacific SiC and GaN Devices and Modules Market Size Forecast by

Region

11.2.4 South America SiC and GaN Devices and Modules Market Size Forecast by Country

11.2.5 Middle East and Africa Forecasted Sales of SiC and GaN Devices and Modules by Country

12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)

12.1 Global SiC and GaN Devices and Modules Market Forecast by Type (2026-2035)

12.1.1 Global Forecasted Sales of SiC and GaN Devices and Modules by Type (2026-2035)

12.1.2 Global SiC and GaN Devices and Modules Market Size Forecast by Type (2026-2035)

12.1.3 Global Forecasted Price of SiC and GaN Devices and Modules by Type (2026-2035)

12.2 Global SiC and GaN Devices and Modules Market Forecast by Application (2026-2035)

12.2.1 Global SiC and GaN Devices and Modules Sales (K Units) Forecast by Application

12.2.2 Global SiC and GaN Devices and Modules Market Size (M USD) Forecast by Application (2026-2035)

13 CONCLUSION AND KEY FINDINGS

List Of Tables

LIST OF TABLES

Table 1. Introduction of the Type

Table 2. Introduction of the Application

Table 3. Global SiC and GaN Devices and Modules Market Size by Type (M USD)

Table 4. Global SiC and GaN Devices and Modules Market Size by Application

Table 5. SiC and GaN Devices and Modules Market Size Comparison by Region (M USD)

Table 6. Global SiC and GaN Devices and Modules Sales (K Units) by Manufacturers (2020-2025)

Table 7. Global SiC and GaN Devices and Modules Sales Market Share by Manufacturers (2020-2025)

Table 8. Global SiC and GaN Devices and Modules Revenue (M USD) by Manufacturers (2020-2025)

Table 9. Global SiC and GaN Devices and Modules Revenue Share by Manufacturers (2020-2025)

Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in SiC and GaN Devices and Modules as of 2025)

Table 11. Global Market SiC and GaN Devices and Modules Average Price (USD/Unit) of Key Manufacturers (2020-2025)

Table 12. Manufacturers? Manufacturing Sites, Areas Served

Table 13. Manufacturers? Product Type

Table 14. Global SiC and GaN Devices and Modules Manufacturers Market Concentration Ratio (CR5 and HHI)

Table 15. Mergers & Acquisitions, Expansion Plans

Table 16. Market Overview of Key Raw Materials

Table 17. Midstream Market Analysis

Table 18. Downstream Customer Analysis

Table 19. Key Development Trends

Table 20. Driving Factors

Table 21. SiC and GaN Devices and Modules Market Challenges

Table 22. Goldman Sachs' forecast real GDP growth rate for 2025-2026

Table 23. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027

Table 24. World Bank ' Forecast Real GDP Growth Rate For 2025-2026

Table 25. The Tariff Rates Imposed by the United States on Major Commodity Trading Countries

Table 26. Global SiC and GaN Devices and Modules Sales by Type (K Units)

Table 27. Global SiC and GaN Devices and Modules Market Size by Type (M USD)

Table 28. Global SiC and GaN Devices and Modules Sales (K Units) by Type
(2020-2025)

Table 29. Global SiC and GaN Devices and Modules Sales Market Share by Type
(2020-2025)

Table 30. Global SiC and GaN Devices and Modules Market Size (M USD) by Type
(2020-2025)

Table 31. Global SiC and GaN Devices and Modules Market Share by Type
(2020-2025)

Table 32. Global SiC and GaN Devices and Modules Price (USD/Unit) by Type
(2020-2025)

Table 33. Global SiC and GaN Devices and Modules Sales (K Units) by Application

Table 34. Global SiC and GaN Devices and Modules Market Size by Application

Table 35. Global SiC and GaN Devices and Modules Sales by Application (2020-2025)
& (K Units)

Table 36. Global SiC and GaN Devices and Modules Sales Market Share by Application
(2020-2025)

Table 37. Global SiC and GaN Devices and Modules Market Size by Application
(2020-2025) & (M USD)

Table 38. Global SiC and GaN Devices and Modules Market Share by Application
(2020-2025)

Table 39. Global SiC and GaN Devices and Modules Sales Growth Rate by Application
(2020-2025)

Table 40. Global SiC and GaN Devices and Modules Sales by Region (2020-2025) & (K
Units)

Table 41. Global SiC and GaN Devices and Modules Sales Market Share by Region
(2020-2025)

Table 42. Global SiC and GaN Devices and Modules Market Size by Region
(2020-2025) & (M USD)

Table 43. Global SiC and GaN Devices and Modules Market Size by Region
(2020-2025)

Table 44. North America SiC and GaN Devices and Modules Sales by Country
(2020-2025) & (K Units)

Table 45. North America SiC and GaN Devices and Modules Market Size by Country
(2020-2025) & (M USD)

Table 46. Europe SiC and GaN Devices and Modules Sales by Country (2020-2025) &
(K Units)

Table 47. Europe SiC and GaN Devices and Modules Market Size by Country
(2020-2025) & (M USD)

Table 48. Asia Pacific SiC and GaN Devices and Modules Sales by Region (2020-2025) & (K Units)

Table 49. Asia Pacific SiC and GaN Devices and Modules Market Size by Region (2020-2025) & (M USD)

Table 50. South America SiC and GaN Devices and Modules Sales by Country (2020-2025) & (K Units)

Table 51. South America SiC and GaN Devices and Modules Market Size by Country (2020-2025) & (M USD)

Table 52. Middle East and Africa SiC and GaN Devices and Modules Sales by Region (2020-2025) & (K Units)

Table 53. Middle East and Africa SiC and GaN Devices and Modules Market Size by Region (2020-2025) & (M USD)

Table 54. Global SiC and GaN Devices and Modules Production (K Units) by Region(2020-2025)

Table 55. Global SiC and GaN Devices and Modules Revenue (US\$ Million) by Region (2020-2025)

Table 56. Global SiC and GaN Devices and Modules Revenue Market Share by Region (2020-2025)

Table 57. Global SiC and GaN Devices and Modules Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 58. North America SiC and GaN Devices and Modules Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 59. Europe SiC and GaN Devices and Modules Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 60. Japan SiC and GaN Devices and Modules Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 61. China SiC and GaN Devices and Modules Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 62. onsemi Basic Information

Table 63. onsemi SiC and GaN Devices and Modules Product Overview

Table 64. onsemi SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 65. onsemi Business Overview

Table 66. onsemi SWOT Analysis

Table 67. onsemi Recent Developments

Table 68. STMicroelectronics Basic Information

Table 69. STMicroelectronics SiC and GaN Devices and Modules Product Overview

Table 70. STMicroelectronics SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 71. STMicroelectronics Business Overview

Table 72. STMicroelectronics SWOT Analysis

Table 73. STMicroelectronics Recent Developments

Table 74. Infineon (GaN Systems) Basic Information

Table 75. Infineon (GaN Systems) SiC and GaN Devices and Modules Product Overview

Table 76. Infineon (GaN Systems) SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 77. Infineon (GaN Systems) Business Overview

Table 78. Infineon (GaN Systems) SWOT Analysis

Table 79. Infineon (GaN Systems) Recent Developments

Table 80. Wolfspeed Basic Information

Table 81. Wolfspeed SiC and GaN Devices and Modules Product Overview

Table 82. Wolfspeed SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 83. Wolfspeed Business Overview

Table 84. Wolfspeed Recent Developments

Table 85. BYD Semiconductor Basic Information

Table 86. BYD Semiconductor SiC and GaN Devices and Modules Product Overview

Table 87. BYD Semiconductor SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 88. BYD Semiconductor Business Overview

Table 89. BYD Semiconductor Recent Developments

Table 90. Bosch Basic Information

Table 91. Bosch SiC and GaN Devices and Modules Product Overview

Table 92. Bosch SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 93. Bosch Business Overview

Table 94. Bosch Recent Developments

Table 95. United Nova Technology Basic Information

Table 96. United Nova Technology SiC and GaN Devices and Modules Product Overview

Table 97. United Nova Technology SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 98. United Nova Technology Business Overview

Table 99. United Nova Technology Recent Developments

Table 100. Innoscience Basic Information

Table 101. Innoscience SiC and GaN Devices and Modules Product Overview

Table 102. Innoscience SiC and GaN Devices and Modules Sales (K Units), Revenue

(M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 103. Innoscience Business Overview

Table 104. Innoscience Recent Developments

Table 105. Navitas (GeneSiC) Basic Information

Table 106. Navitas (GeneSiC) SiC and GaN Devices and Modules Product Overview

Table 107. Navitas (GeneSiC) SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 108. Navitas (GeneSiC) Business Overview

Table 109. Navitas (GeneSiC) Recent Developments

Table 110. Guangdong AccoPower Semiconductor Basic Information

Table 111. Guangdong AccoPower Semiconductor SiC and GaN Devices and Modules Product Overview

Table 112. Guangdong AccoPower Semiconductor SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 113. Guangdong AccoPower Semiconductor Business Overview

Table 114. Guangdong AccoPower Semiconductor Recent Developments

Table 115. Rohm Basic Information

Table 116. Rohm SiC and GaN Devices and Modules Product Overview

Table 117. Rohm SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 118. Rohm Business Overview

Table 119. Rohm Recent Developments

Table 120. San'an Optoelectronics Basic Information

Table 121. San'an Optoelectronics SiC and GaN Devices and Modules Product Overview

Table 122. San'an Optoelectronics SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 123. San'an Optoelectronics Business Overview

Table 124. San'an Optoelectronics Recent Developments

Table 125. Efficient Power Conversion Corporation (EPC) Basic Information

Table 126. Efficient Power Conversion Corporation (EPC) SiC and GaN Devices and Modules Product Overview

Table 127. Efficient Power Conversion Corporation (EPC) SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 128. Efficient Power Conversion Corporation (EPC) Business Overview

Table 129. Efficient Power Conversion Corporation (EPC) Recent Developments

Table 130. Power Integrations, Inc. Basic Information

Table 131. Power Integrations, Inc. SiC and GaN Devices and Modules Product

Overview

Table 132. Power Integrations, Inc. SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 133. Power Integrations, Inc. Business Overview

Table 134. Power Integrations, Inc. Recent Developments

Table 135. Semikron Danfoss Basic Information

Table 136. Semikron Danfoss SiC and GaN Devices and Modules Product Overview

Table 137. Semikron Danfoss SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 138. Semikron Danfoss Business Overview

Table 139. Semikron Danfoss Recent Developments

Table 140. Mitsubishi Electric Basic Information

Table 141. Mitsubishi Electric SiC and GaN Devices and Modules Product Overview

Table 142. Mitsubishi Electric SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 143. Mitsubishi Electric Business Overview

Table 144. Mitsubishi Electric Recent Developments

Table 145. BASiC Semiconductor Basic Information

Table 146. BASiC Semiconductor SiC and GaN Devices and Modules Product Overview

Table 147. BASiC Semiconductor SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 148. BASiC Semiconductor Business Overview

Table 149. BASiC Semiconductor Recent Developments

Table 150. Fuji Electric Basic Information

Table 151. Fuji Electric SiC and GaN Devices and Modules Product Overview

Table 152. Fuji Electric SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 153. Fuji Electric Business Overview

Table 154. Fuji Electric Recent Developments

Table 155. SemiQ Basic Information

Table 156. SemiQ SiC and GaN Devices and Modules Product Overview

Table 157. SemiQ SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 158. SemiQ Business Overview

Table 159. SemiQ Recent Developments

Table 160. PN Junction Semiconductor (Hangzhou) Basic Information

Table 161. PN Junction Semiconductor (Hangzhou) SiC and GaN Devices and Modules Product Overview

Table 162. PN Junction Semiconductor (Hangzhou) SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 163. PN Junction Semiconductor (Hangzhou) Business Overview

Table 164. PN Junction Semiconductor (Hangzhou) Recent Developments

Table 165. Zhuzhou CRRC Times Electric Basic Information

Table 166. Zhuzhou CRRC Times Electric SiC and GaN Devices and Modules Product Overview

Table 167. Zhuzhou CRRC Times Electric SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 168. Zhuzhou CRRC Times Electric Business Overview

Table 169. Zhuzhou CRRC Times Electric Recent Developments

Table 170. InventChip Technology Basic Information

Table 171. InventChip Technology SiC and GaN Devices and Modules Product Overview

Table 172. InventChip Technology SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 173. InventChip Technology Business Overview

Table 174. InventChip Technology Recent Developments

Table 175. Microchip (Microsemi) Basic Information

Table 176. Microchip (Microsemi) SiC and GaN Devices and Modules Product Overview

Table 177. Microchip (Microsemi) SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 178. Microchip (Microsemi) Business Overview

Table 179. Microchip (Microsemi) Recent Developments

Table 180. CETC 55 Basic Information

Table 181. CETC 55 SiC and GaN Devices and Modules Product Overview

Table 182. CETC 55 SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 183. CETC 55 Business Overview

Table 184. CETC 55 Recent Developments

Table 185. Toshiba Basic Information

Table 186. Toshiba SiC and GaN Devices and Modules Product Overview

Table 187. Toshiba SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 188. Toshiba Business Overview

Table 189. Toshiba Recent Developments

Table 190. WeEn Semiconductors Basic Information

Table 191. WeEn Semiconductors SiC and GaN Devices and Modules Product Overview

Table 192. WeEn Semiconductors SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 193. WeEn Semiconductors Business Overview

Table 194. WeEn Semiconductors Recent Developments

Table 195. Littelfuse (IXYS) Basic Information

Table 196. Littelfuse (IXYS) SiC and GaN Devices and Modules Product Overview

Table 197. Littelfuse (IXYS) SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 198. Littelfuse (IXYS) Business Overview

Table 199. Littelfuse (IXYS) Recent Developments

Table 200. Renesas Electronics (Transphorm) Basic Information

Table 201. Renesas Electronics (Transphorm) SiC and GaN Devices and Modules Product Overview

Table 202. Renesas Electronics (Transphorm) SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 203. Renesas Electronics (Transphorm) Business Overview

Table 204. Renesas Electronics (Transphorm) Recent Developments

Table 205. Yangzhou Yangjie Electronic Technology Basic Information

Table 206. Yangzhou Yangjie Electronic Technology SiC and GaN Devices and Modules Product Overview

Table 207. Yangzhou Yangjie Electronic Technology SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 208. Yangzhou Yangjie Electronic Technology Business Overview

Table 209. Yangzhou Yangjie Electronic Technology Recent Developments

Table 210. Vishay Intertechnology Basic Information

Table 211. Vishay Intertechnology SiC and GaN Devices and Modules Product Overview

Table 212. Vishay Intertechnology SiC and GaN Devices and Modules Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 213. Vishay Intertechnology Business Overview

Table 214. Vishay Intertechnology Recent Developments

Table 215. Global SiC and GaN Devices and Modules Sales Forecast by Region (2026-2035) & (K Units)

Table 216. Global SiC and GaN Devices and Modules Market Size Forecast by Region (2026-2035) & (M USD)

Table 217. North America SiC and GaN Devices and Modules Sales Forecast by Country (2026-2035) & (K Units)

Table 218. North America SiC and GaN Devices and Modules Market Size Forecast by

Country (2026-2035) & (M USD)

Table 219. Europe SiC and GaN Devices and Modules Sales Forecast by Country (2026-2035) & (K Units)

Table 220. Europe SiC and GaN Devices and Modules Market Size Forecast by Country (2026-2035) & (M USD)

Table 221. Asia Pacific SiC and GaN Devices and Modules Sales Forecast by Region (2026-2035) & (K Units)

Table 222. Asia Pacific SiC and GaN Devices and Modules Market Size Forecast by Region (2026-2035) & (M USD)

Table 223. South America SiC and GaN Devices and Modules Sales Forecast by Country (2026-2035) & (K Units)

Table 224. South America SiC and GaN Devices and Modules Market Size Forecast by Country (2026-2035) & (M USD)

Table 225. Middle East and Africa SiC and GaN Devices and Modules Sales Forecast by Country (2026-2035) & (Units)

Table 226. Middle East and Africa SiC and GaN Devices and Modules Market Size Forecast by Country (2026-2035) & (M USD)

Table 227. Global SiC and GaN Devices and Modules Sales Forecast by Type (2026-2035) & (K Units)

Table 228. Global SiC and GaN Devices and Modules Market Size Forecast by Type (2026-2035) & (M USD)

Table 229. Global SiC and GaN Devices and Modules Price Forecast by Type (2026-2035) & (USD/Unit)

Table 230. Global SiC and GaN Devices and Modules Sales (K Units) Forecast by Application (2026-2035)

Table 231. Global SiC and GaN Devices and Modules Market Size Forecast by Application (2026-2035) & (M USD)

List Of Figures

LIST OF FIGURES

- Figure 1. Product Picture of SiC and GaN Devices and Modules
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global SiC and GaN Devices and Modules Market Size (M USD), 2025-2035
- Figure 5. Global SiC and GaN Devices and Modules Market Size (M USD) (2020-2035)
- Figure 6. Global SiC and GaN Devices and Modules Sales (K Units) & (2020-2035)
- Figure 7. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 8. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 9. Evaluation Matrix of Regional Market Development Potential
- Figure 10. SiC and GaN Devices and Modules Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global SiC and GaN Devices and Modules Product Life Cycle
- Figure 13. SiC and GaN Devices and Modules Sales Share by Manufacturers in 2025
- Figure 14. Global SiC and GaN Devices and Modules Revenue Share by Manufacturers in 2025
- Figure 15. SiC and GaN Devices and Modules Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market SiC and GaN Devices and Modules Average Price (USD/Unit) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by SiC and GaN Devices and Modules Revenue in 2025
- Figure 18. Industry Chain Map of SiC and GaN Devices and Modules
- Figure 19. Global SiC and GaN Devices and Modules Market PEST Analysis
- Figure 20. Global SiC and GaN Devices and Modules Market Porter's Five Forces Analysis
- Figure 21. Global Merchandise Trade as a Percentage Of GDP
- Figure 22. US - Imports of Goods by Country
- Figure 23. China Exports by Country
- Figure 24. ESG Rating Distribution of The Leading Company Compared With Its Peers
- Figure 25. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 26. Global SiC and GaN Devices and Modules Market Share by Type
- Figure 27. Sales Market Share of SiC and GaN Devices and Modules by Type (2020-2025)
- Figure 28. Sales Market Share of SiC and GaN Devices and Modules by Type in 2025
- Figure 29. Market Share of SiC and GaN Devices and Modules by Type (2020-2025)

- Figure 30. Market Share of SiC and GaN Devices and Modules by Type in 2025
- Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 32. Global SiC and GaN Devices and Modules Market Share by Application
- Figure 33. Global SiC and GaN Devices and Modules Sales Market Share by Application (2020-2025)
- Figure 34. Global SiC and GaN Devices and Modules Sales Market Share by Application in 2025
- Figure 35. Global SiC and GaN Devices and Modules Market Share by Application (2020-2025)
- Figure 36. Global SiC and GaN Devices and Modules Market Share by Application in 2025
- Figure 37. Global SiC and GaN Devices and Modules Sales Growth Rate by Application (2020-2025)
- Figure 38. Global SiC and GaN Devices and Modules Sales Market Share by Region (2020-2025)
- Figure 39. Global SiC and GaN Devices and Modules Market Size by Region (2020-2025)
- Figure 40. North America SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)
- Figure 41. North America SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)
- Figure 42. North America SiC and GaN Devices and Modules Sales Market Share by Country in 2024
- Figure 43. North America SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 44. North America SiC and GaN Devices and Modules Market Size by Country in 2024
- Figure 45. U.S. SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)
- Figure 46. U.S. SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 47. Canada SiC and GaN Devices and Modules Sales (K Units) and Growth Rate (2020-2025)
- Figure 48. Canada SiC and GaN Devices and Modules Market Size (M USD) and Growth Rate (2020-2025)
- Figure 49. Mexico SiC and GaN Devices and Modules Sales (Units) and Growth Rate (2020-2025)
- Figure 50. Mexico SiC and GaN Devices and Modules Market Size (Units) and Growth Rate (2020-2025)

Figure 51. Europe SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)

Figure 52. Europe SiC and GaN Devices and Modules Sales Market Share by Country in 2024

Figure 53. Europe SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)

Figure 54. Europe SiC and GaN Devices and Modules Market Size by Country in 2024

Figure 55. Germany SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)

Figure 56. Germany SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)

Figure 57. France SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)

Figure 58. France SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)

Figure 59. U.K. SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)

Figure 60. U.K. SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)

Figure 62. Italy SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)

Figure 64. Spain SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific SiC and GaN Devices and Modules Sales and Growth Rate (K Units)

Figure 66. Asia Pacific SiC and GaN Devices and Modules Sales Market Share by Region in 2024

Figure 67. Asia Pacific SiC and GaN Devices and Modules Market Size by Region in 2024

Figure 68. China SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)

Figure 69. China SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)

Figure 71. Japan SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)

Figure 72. South Korea SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)

Figure 73. South Korea SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)

Figure 74. India SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)

Figure 75. India SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)

Figure 76. Southeast Asia SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)

Figure 77. Southeast Asia SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)

Figure 78. South America SiC and GaN Devices and Modules Sales and Growth Rate (K Units)

Figure 79. South America SiC and GaN Devices and Modules Sales Market Share by Country in 2024

Figure 80. South America SiC and GaN Devices and Modules Market Size and Growth Rate (M USD)

Figure 81. South America SiC and GaN Devices and Modules Market Size by Country in 2024

Figure 82. Brazil SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)

Figure 83. Brazil SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)

Figure 84. Argentina SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)

Figure 85. Argentina SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)

Figure 86. Columbia SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)

Figure 87. Columbia SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)

Figure 88. Middle East and Africa SiC and GaN Devices and Modules Sales and Growth Rate (K Units)

Figure 89. Middle East and Africa SiC and GaN Devices and Modules Sales Market Share by Region in 2024

Figure 90. Middle East and Africa SiC and GaN Devices and Modules Market Size and

Growth Rate (M USD)

Figure 91. Middle East and Africa SiC and GaN Devices and Modules Market Size by Region in 2024

Figure 92. Saudi Arabia SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)

Figure 93. Saudi Arabia SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)

Figure 94. UAE SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)

Figure 95. UAE SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)

Figure 96. Egypt SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)

Figure 97. Egypt SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)

Figure 98. Nigeria SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)

Figure 99. Nigeria SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)

Figure 100. South Africa SiC and GaN Devices and Modules Sales and Growth Rate (2020-2025) & (K Units)

Figure 101. South Africa SiC and GaN Devices and Modules Market Size and Growth Rate (2020-2025) & (M USD)

Figure 102. Global SiC and GaN Devices and Modules Production Market Share by Region (2020-2025)

Figure 103. North America SiC and GaN Devices and Modules Production (K Units) Growth Rate (2020-2025)

Figure 104. Europe SiC and GaN Devices and Modules Production (K Units) Growth Rate (2020-2025)

Figure 105. Japan SiC and GaN Devices and Modules Production (K Units) Growth Rate (2020-2025)

Figure 106. China SiC and GaN Devices and Modules Production (K Units) Growth Rate (2020-2025)

Figure 107. Global SiC and GaN Devices and Modules Sales Forecast by Volume (2020-2035) & (K Units)

Figure 108. Global SiC and GaN Devices and Modules Market Size Forecast by Value (2020-2035) & (M USD)

Figure 109. Global SiC and GaN Devices and Modules Sales Market Share Forecast by Type (2026-2035)

Figure 110. Global SiC and GaN Devices and Modules Market Share Forecast by Type (2026-2035)

Figure 111. Global SiC and GaN Devices and Modules Sales Forecast by Application (2026-2035)

Figure 112. Global SiC and GaN Devices and Modules Market Share Forecast by Application (2026-2035)

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