

# Global SiC Substrates 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 Substrates competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Silicon carbide (SiC) substrates are the core foundation of third-generation semiconductor materials, grown from silicon carbide single crystals. They feature a wide bandgap (3.26 eV), high critical breakdown field strength (3 MV/cm), and high thermal conductivity (4.9 W/cm<sup>2</sup>K), making them suitable for high-temperature, high-frequency, and high-power applications. Their primary function is to serve as the physical substrate for SiC power devices (such as MOSFETs and diodes), with functional layers formed through epitaxial growth.

**The boom in new energy vehicles:** The widespread adoption of 800V high-voltage platforms is driving the penetration rate of silicon carbide main drive inverters from 15% in 2023 to 45% in 2026, with models such as the Xpeng G6 and Zeekr X already featuring them as standard equipment.

**Photovoltaic energy storage revolution:** Huawei's 200kW string inverter adopts a fully silicon carbide solution, achieving an efficiency of 99.1%, an improvement of 0.8 percentage points over silicon-based IGBTs; CATL's energy storage system incorporates silicon carbide DC/DC converters, reducing volume by 40%.

**Strong Policy Support:** China offers a 30% procurement subsidy for domestically produced equipment such as crystal growth furnaces and ion implanters; the U.S. CHIPS Act provides funding support for silicon carbide projects (though there is uncertainty regarding the policy beyond 2025).

**Technical breakthrough directions**

**Size upgrade:** The cost per wafer for 8-inch substrates is 35% lower than for 6-inch substrates. Companies like Wolfspeed and TianYue Advanced have achieved mass production, but the global average yield rate remains below 50%. Breakthroughs are needed in crystal growth efficiency (reducing the PVT method cycle from 100 hours to 70 hours) and microchannel density (

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