

Global Automotive IGBT Modules Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Automotive IGBT Modules market size is expected to reach \$ 8443 million by 2032, rising at a market growth of 12.9% CAGR during the forecast period (2026-2032).

Automotive IGBT modules are automotive-qualified, high-reliability power modules that integrate multiple silicon IGBT dies plus freewheeling diodes (and often NTC/temperature sensing and low-inductance busbar structures) into standardized building blocks for vehicle power converters?most importantly the traction inverter. Compared with general-purpose industrial modules, automotive modules emphasize power cycling / thermal cycling lifetime, vibration and harsh-environment robustness, and OEM/Tier-1 qualification frameworks such as ECPE?s AQC 324, which is specifically aimed at power modules used in motor-vehicle power-electronics converter units. Product families are commonly organized by battery/DC-link voltage class and current class, with mainstream automotive offerings spanning ~650 V (typical for many 400 V platforms) and moving to ~750 V and 1200 V (and beyond) as platforms scale; for example, Mitsubishi Electric lists Automotive IGBT modules (J1 series) at 650 V and automotive SiC/Si module families spanning ~750?1300 V, while Infineon?s HybridPACK? Drive highlights traction solutions in 750 V and 1200 V classes and explicitly references AQC324 automotive qualification. In parallel, module makers increasingly differentiate via cooling and mechanical architecture (e.g., direct-cooled baseplates with pin-fin concepts) to raise power density without sacrificing lifetime. From a global market and application standpoint, automotive IGBT modules remain a large-volume backbone technology for HEV/PHEV and many cost-optimized BEV traction inverters, even as SiC adoption grows in premium-efficiency segments. The demand ?floor? is set by electrification scale: the IEA reports that electric car sales topped 17 million worldwide in 2024, keeping traction inverters and power converter units (PCUs) on a strong multi-year growth track. Functionally, the traction inverter

converts the battery DC into AC for propulsion and supports regenerative operation, which is why it is the primary value pool for high-current automotive power modules. Typical automotive IGBT-module application clusters include main traction inverter/PCU, and (depending on OEM architecture) additional converters such as auxiliary inverters, e-compressor drives, PTC/heater stages, and certain DC-link conversion blocks, where the decision often balances efficiency vs cost vs thermal-lifetime constraints. Suppliers? public materials underline these packaging-driven constraints: Fuji Electric notes that automotive IGBT modules are developed with a strong ?downsizing? concept for limited vehicle packaging space, and it also highlights direct liquid-cooling / thin module approaches for EV/HEV powertrains?both reflecting the automotive focus on compactness plus reliability.

Looking forward, the technology and competitive trajectory is increasingly driven by (1) higher power density via direct cooling and lower stray inductance, (2) longer power-cycling lifetime through advanced interconnect/attach choices and robust mechanical stacks, and (3) standardized, comparable qualification/testing practices across the supply chain?which is exactly what AQG 324 is designed to support (ECPE also runs dedicated tutorials on testing to AQG 324 under comparable conditions). Competition is led by global IDMs and module specialists that can combine chipset roadmap + automotive-grade packaging + validated lifetime models + scale manufacturing, with representative platform signals including Infineon?s HybridPACK? Drive positioning (traction focus, scalable 750/1200 V classes, AQG324) and Semikron Danfoss? traction-oriented DCM? platform designed to scale within ~750?1200 V inverter voltage classes and wide current ranges. On the industry chain, upstream includes silicon wafers and IGBT/diode front-end manufacturing; midstream centers on automotive-grade module packaging (ceramic substrates, baseplate/direct-cooling structures, interconnect, encapsulation, test and reliability qualification); and downstream consists mainly of traction inverter/PCU makers (Tier-1s) and OEMs who integrate the module into the e-axle/inverter system and validate lifetime, thermal management and functional safety at vehicle level?so the winning edge increasingly comes from ?system-ready, qualified platforms,? not only die-level performance.

This report studies the global Automotive IGBT Modules production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive IGBT Modules and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Automotive IGBT Modules that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automotive IGBT Modules total production and demand, 2021-2032, (K Units)

Global Automotive IGBT Modules total production value, 2021-2032, (USD Million)

Global Automotive IGBT Modules production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Automotive IGBT Modules consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Automotive IGBT Modules domestic production, consumption, key domestic manufacturers and share

Global Automotive IGBT Modules production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Automotive IGBT Modules production By Voltage, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Automotive IGBT Modules production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Automotive IGBT Modules market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Infineon, Mitsubishi Electric, Fuji Electric, Zhuzhou CRRC Times Electric, BYD Semiconductor, Semikron Danfoss, StarPower, onsemi, Denso, Hangzhou Silan Microelectronics, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Automotive IGBT Modules market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, By Voltage, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Automotive IGBT Modules Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Automotive IGBT Modules Market, Segmentation By Voltage:

650V/750V IGBT Modules

1200V IGBT Modules

Global Automotive IGBT Modules Market, Segmentation by EV Type:

BEV

HEV/PHEV

Global Automotive IGBT Modules Market, Segmentation by Application:

Electric Vehicle (EV) Traction Inverter

DC-DC, and OBC

Electric Vehicle (EV) Charging Station

Companies Profiled:

Infineon

Mitsubishi Electric

Fuji Electric

Zhuzhou CRRC Times Electric

BYD Semiconductor

Semikron Danfoss

StarPower

onsemi

Denso

Hangzhou Silan Microelectronics

Bosch

United Nova Technology (UNT)

Microchip (Microsemi)

Grecon Semiconductor (Shanghai)

GeePak

Archimedes Semiconductor (Hefei)

Hefei Cpower Technology

ZhiXin Semiconductor

MacMic Science & Technolog

Key Questions Answered:

1. How big is the global Automotive IGBT Modules market?
2. What is the demand of the global Automotive IGBT Modules market?
3. What is the year over year growth of the global Automotive IGBT Modules market?
4. What is the production and production value of the global Automotive IGBT Modules

market?

5. Who are the key producers in the global Automotive IGBT Modules market?

6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Automotive IGBT Modules Introduction
- 1.2 World Automotive IGBT Modules Supply & Forecast
 - 1.2.1 World Automotive IGBT Modules Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Automotive IGBT Modules Production (2021-2032)
 - 1.2.3 World Automotive IGBT Modules Pricing Trends (2021-2032)
- 1.3 World Automotive IGBT Modules Production by Region (Based on Production Site)
 - 1.3.1 World Automotive IGBT Modules Production Value by Region (2021-2032)
 - 1.3.2 World Automotive IGBT Modules Production by Region (2021-2032)
 - 1.3.3 World Automotive IGBT Modules Average Price by Region (2021-2032)
 - 1.3.4 North America Automotive IGBT Modules Production (2021-2032)
 - 1.3.5 Europe Automotive IGBT Modules Production (2021-2032)
 - 1.3.6 China Automotive IGBT Modules Production (2021-2032)
 - 1.3.7 Japan Automotive IGBT Modules Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Automotive IGBT Modules Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Automotive IGBT Modules Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Automotive IGBT Modules Demand (2021-2032)
- 2.2 World Automotive IGBT Modules Consumption by Region
 - 2.2.1 World Automotive IGBT Modules Consumption by Region (2021-2026)
 - 2.2.2 World Automotive IGBT Modules Consumption Forecast by Region (2027-2032)
- 2.3 United States Automotive IGBT Modules Consumption (2021-2032)
- 2.4 China Automotive IGBT Modules Consumption (2021-2032)
- 2.5 Europe Automotive IGBT Modules Consumption (2021-2032)
- 2.6 Japan Automotive IGBT Modules Consumption (2021-2032)
- 2.7 South Korea Automotive IGBT Modules Consumption (2021-2032)
- 2.8 ASEAN Automotive IGBT Modules Consumption (2021-2032)
- 2.9 India Automotive IGBT Modules Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Automotive IGBT Modules Production Value by Manufacturer (2021-2026)

- 3.2 World Automotive IGBT Modules Production by Manufacturer (2021-2026)
- 3.3 World Automotive IGBT Modules Average Price by Manufacturer (2021-2026)
- 3.4 Automotive IGBT Modules Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Automotive IGBT Modules Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Automotive IGBT Modules in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Automotive IGBT Modules in 2025
- 3.6 Automotive IGBT Modules Market: Overall Company Footprint Analysis
 - 3.6.1 Automotive IGBT Modules Market: Region Footprint
 - 3.6.2 Automotive IGBT Modules Market: Company Product Type Footprint
 - 3.6.3 Automotive IGBT Modules Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Automotive IGBT Modules Production Value Comparison
 - 4.1.1 United States VS China: Automotive IGBT Modules Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Automotive IGBT Modules Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Automotive IGBT Modules Production Comparison
 - 4.2.1 United States VS China: Automotive IGBT Modules Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Automotive IGBT Modules Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Automotive IGBT Modules Consumption Comparison
 - 4.3.1 United States VS China: Automotive IGBT Modules Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Automotive IGBT Modules Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Automotive IGBT Modules Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Automotive IGBT Modules Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Automotive IGBT Modules Production Value (2021-2026)

4.4.3 United States Based Manufacturers Automotive IGBT Modules Production (2021-2026)

4.5 China Based Automotive IGBT Modules Manufacturers and Market Share

4.5.1 China Based Automotive IGBT Modules Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Automotive IGBT Modules Production Value (2021-2026)

4.5.3 China Based Manufacturers Automotive IGBT Modules Production (2021-2026)

4.6 Rest of World Based Automotive IGBT Modules Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Automotive IGBT Modules Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Automotive IGBT Modules Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Automotive IGBT Modules Production (2021-2026)

5 MARKET ANALYSIS BY VOLTAGE

5.1 World Automotive IGBT Modules Market Size Overview By Voltage: 2021 VS 2025 VS 2032

5.2 Segment Introduction By Voltage

5.2.1 650V/750V IGBT Modules

5.2.2 1200V IGBT Modules

5.3 Market Segment By Voltage

5.3.1 World Automotive IGBT Modules Production By Voltage (2021-2032)

5.3.2 World Automotive IGBT Modules Production Value By Voltage (2021-2032)

5.3.3 World Automotive IGBT Modules Average Price By Voltage (2021-2032)

6 MARKET ANALYSIS BY EV TYPE

6.1 World Automotive IGBT Modules Market Size Overview by EV Type: 2021 VS 2025 VS 2032

6.2 Segment Introduction by EV Type

6.2.1 BEV

6.2.2 HEV/PHEV

6.3 Market Segment by EV Type

- 6.3.1 World Automotive IGBT Modules Production by EV Type (2021-2032)
- 6.3.2 World Automotive IGBT Modules Production Value by EV Type (2021-2032)
- 6.3.3 World Automotive IGBT Modules Average Price by EV Type (2021-2032)

7 MARKET ANALYSIS BY APPLICATION

- 7.1 World Automotive IGBT Modules Market Size Overview by Application: 2021 VS 2025 VS 2032
- 7.2 Segment Introduction by Application
 - 7.2.1 Electric Vehicle (EV) Traction Inverter
 - 7.2.2 DC-DC, and OBC
 - 7.2.3 Electric Vehicle (EV) Charging Station
- 7.3 Market Segment by Application
 - 7.3.1 World Automotive IGBT Modules Production by Application (2021-2032)
 - 7.3.2 World Automotive IGBT Modules Production Value by Application (2021-2032)
 - 7.3.3 World Automotive IGBT Modules Average Price by Application (2021-2032)

8 COMPANY PROFILES

- 8.1 Infineon
 - 8.1.1 Infineon Details
 - 8.1.2 Infineon Major Business
 - 8.1.3 Infineon Automotive IGBT Modules Product and Services
 - 8.1.4 Infineon Automotive IGBT Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.1.5 Infineon Recent Developments/Updates
 - 8.1.6 Infineon Competitive Strengths & Weaknesses
- 8.2 Mitsubishi Electric
 - 8.2.1 Mitsubishi Electric Details
 - 8.2.2 Mitsubishi Electric Major Business
 - 8.2.3 Mitsubishi Electric Automotive IGBT Modules Product and Services
 - 8.2.4 Mitsubishi Electric Automotive IGBT Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.2.5 Mitsubishi Electric Recent Developments/Updates
 - 8.2.6 Mitsubishi Electric Competitive Strengths & Weaknesses
- 8.3 Fuji Electric
 - 8.3.1 Fuji Electric Details
 - 8.3.2 Fuji Electric Major Business
 - 8.3.3 Fuji Electric Automotive IGBT Modules Product and Services

8.3.4 Fuji Electric Automotive IGBT Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.3.5 Fuji Electric Recent Developments/Updates

8.3.6 Fuji Electric Competitive Strengths & Weaknesses

8.4 Zhuzhou CRRC Times Electric

8.4.1 Zhuzhou CRRC Times Electric Details

8.4.2 Zhuzhou CRRC Times Electric Major Business

8.4.3 Zhuzhou CRRC Times Electric Automotive IGBT Modules Product and Services

8.4.4 Zhuzhou CRRC Times Electric Automotive IGBT Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.4.5 Zhuzhou CRRC Times Electric Recent Developments/Updates

8.4.6 Zhuzhou CRRC Times Electric Competitive Strengths & Weaknesses

8.5 BYD Semiconductor

8.5.1 BYD Semiconductor Details

8.5.2 BYD Semiconductor Major Business

8.5.3 BYD Semiconductor Automotive IGBT Modules Product and Services

8.5.4 BYD Semiconductor Automotive IGBT Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.5.5 BYD Semiconductor Recent Developments/Updates

8.5.6 BYD Semiconductor Competitive Strengths & Weaknesses

8.6 Semikron Danfoss

8.6.1 Semikron Danfoss Details

8.6.2 Semikron Danfoss Major Business

8.6.3 Semikron Danfoss Automotive IGBT Modules Product and Services

8.6.4 Semikron Danfoss Automotive IGBT Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.6.5 Semikron Danfoss Recent Developments/Updates

8.6.6 Semikron Danfoss Competitive Strengths & Weaknesses

8.7 StarPower

8.7.1 StarPower Details

8.7.2 StarPower Major Business

8.7.3 StarPower Automotive IGBT Modules Product and Services

8.7.4 StarPower Automotive IGBT Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.7.5 StarPower Recent Developments/Updates

8.7.6 StarPower Competitive Strengths & Weaknesses

8.8 onsemi

8.8.1 onsemi Details

8.8.2 onsemi Major Business

- 8.8.3 onsemi Automotive IGBT Modules Product and Services
- 8.8.4 onsemi Automotive IGBT Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 8.8.5 onsemi Recent Developments/Updates
- 8.8.6 onsemi Competitive Strengths & Weaknesses
- 8.9 Denso
 - 8.9.1 Denso Details
 - 8.9.2 Denso Major Business
 - 8.9.3 Denso Automotive IGBT Modules Product and Services
 - 8.9.4 Denso Automotive IGBT Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.9.5 Denso Recent Developments/Updates
 - 8.9.6 Denso Competitive Strengths & Weaknesses
- 8.10 Hangzhou Silan Microelectronics
 - 8.10.1 Hangzhou Silan Microelectronics Details
 - 8.10.2 Hangzhou Silan Microelectronics Major Business
 - 8.10.3 Hangzhou Silan Microelectronics Automotive IGBT Modules Product and Services
 - 8.10.4 Hangzhou Silan Microelectronics Automotive IGBT Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.10.5 Hangzhou Silan Microelectronics Recent Developments/Updates
 - 8.10.6 Hangzhou Silan Microelectronics Competitive Strengths & Weaknesses
- 8.11 Bosch
 - 8.11.1 Bosch Details
 - 8.11.2 Bosch Major Business
 - 8.11.3 Bosch Automotive IGBT Modules Product and Services
 - 8.11.4 Bosch Automotive IGBT Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.11.5 Bosch Recent Developments/Updates
 - 8.11.6 Bosch Competitive Strengths & Weaknesses
- 8.12 United Nova Technology (UNT)
 - 8.12.1 United Nova Technology (UNT) Details
 - 8.12.2 United Nova Technology (UNT) Major Business
 - 8.12.3 United Nova Technology (UNT) Automotive IGBT Modules Product and Services
 - 8.12.4 United Nova Technology (UNT) Automotive IGBT Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.12.5 United Nova Technology (UNT) Recent Developments/Updates
 - 8.12.6 United Nova Technology (UNT) Competitive Strengths & Weaknesses

8.13 Microchip (Microsemi)

8.13.1 Microchip (Microsemi) Details

8.13.2 Microchip (Microsemi) Major Business

8.13.3 Microchip (Microsemi) Automotive IGBT Modules Product and Services

8.13.4 Microchip (Microsemi) Automotive IGBT Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.13.5 Microchip (Microsemi) Recent Developments/Updates

8.13.6 Microchip (Microsemi) Competitive Strengths & Weaknesses

8.14 Grecon Semiconductor (Shanghai)

8.14.1 Grecon Semiconductor (Shanghai) Details

8.14.2 Grecon Semiconductor (Shanghai) Major Business

8.14.3 Grecon Semiconductor (Shanghai) Automotive IGBT Modules Product and Services

8.14.4 Grecon Semiconductor (Shanghai) Automotive IGBT Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.14.5 Grecon Semiconductor (Shanghai) Recent Developments/Updates

8.14.6 Grecon Semiconductor (Shanghai) Competitive Strengths & Weaknesses

8.15 GeePak

8.15.1 GeePak Details

8.15.2 GeePak Major Business

8.15.3 GeePak Automotive IGBT Modules Product and Services

8.15.4 GeePak Automotive IGBT Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.15.5 GeePak Recent Developments/Updates

8.15.6 GeePak Competitive Strengths & Weaknesses

8.16 Archimedes Semiconductor (Hefei)

8.16.1 Archimedes Semiconductor (Hefei) Details

8.16.2 Archimedes Semiconductor (Hefei) Major Business

8.16.3 Archimedes Semiconductor (Hefei) Automotive IGBT Modules Product and Services

8.16.4 Archimedes Semiconductor (Hefei) Automotive IGBT Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.16.5 Archimedes Semiconductor (Hefei) Recent Developments/Updates

8.16.6 Archimedes Semiconductor (Hefei) Competitive Strengths & Weaknesses

8.17 Hefei Cpower Technology

8.17.1 Hefei Cpower Technology Details

8.17.2 Hefei Cpower Technology Major Business

8.17.3 Hefei Cpower Technology Automotive IGBT Modules Product and Services

8.17.4 Hefei Cpower Technology Automotive IGBT Modules Production, Price, Value,

Gross Margin and Market Share (2021-2026)

8.17.5 Hefei Cpower Technology Recent Developments/Updates

8.17.6 Hefei Cpower Technology Competitive Strengths & Weaknesses

8.18 ZhiXin Semiconductor

8.18.1 ZhiXin Semiconductor Details

8.18.2 ZhiXin Semiconductor Major Business

8.18.3 ZhiXin Semiconductor Automotive IGBT Modules Product and Services

8.18.4 ZhiXin Semiconductor Automotive IGBT Modules Production, Price, Value,

Gross Margin and Market Share (2021-2026)

8.18.5 ZhiXin Semiconductor Recent Developments/Updates

8.18.6 ZhiXin Semiconductor Competitive Strengths & Weaknesses

8.19 MacMic Science & Technolog

8.19.1 MacMic Science & Technolog Details

8.19.2 MacMic Science & Technolog Major Business

8.19.3 MacMic Science & Technolog Automotive IGBT Modules Product and Services

8.19.4 MacMic Science & Technolog Automotive IGBT Modules Production, Price,

Value, Gross Margin and Market Share (2021-2026)

8.19.5 MacMic Science & Technolog Recent Developments/Updates

8.19.6 MacMic Science & Technolog Competitive Strengths & Weaknesses

9 INDUSTRY CHAIN ANALYSIS

9.1 Automotive IGBT Modules Industry Chain

9.2 Automotive IGBT Modules Upstream Analysis

9.2.1 Automotive IGBT Modules Core Raw Materials

9.2.2 Main Manufacturers of Automotive IGBT Modules Core Raw Materials

9.3 Midstream Analysis

9.4 Downstream Analysis

9.5 Automotive IGBT Modules Production Mode

9.6 Automotive IGBT Modules Procurement Model

9.7 Automotive IGBT Modules Industry Sales Model and Sales Channels

9.7.1 Automotive IGBT Modules Sales Model

9.7.2 Automotive IGBT Modules Typical Distributors

10 RESEARCH FINDINGS AND CONCLUSION

11 APPENDIX

11.1 Methodology

11.2 Research Process and Data Source

11.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Automotive IGBT Modules Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Automotive IGBT Modules Production Value by Region (2021-2026) & (USD Million)

Table 3. World Automotive IGBT Modules Production Value by Region (2027-2032) & (USD Million)

Table 4. World Automotive IGBT Modules Production Value Market Share by Region (2021-2026)

Table 5. World Automotive IGBT Modules Production Value Market Share by Region (2027-2032)

Table 6. World Automotive IGBT Modules Production by Region (2021-2026) & (K Units)

Table 7. World Automotive IGBT Modules Production by Region (2027-2032) & (K Units)

Table 8. World Automotive IGBT Modules Production Market Share by Region (2021-2026)

Table 9. World Automotive IGBT Modules Production Market Share by Region (2027-2032)

Table 10. World Automotive IGBT Modules Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Automotive IGBT Modules Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Automotive IGBT Modules Major Market Trends

Table 13. World Automotive IGBT Modules Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)

Table 14. World Automotive IGBT Modules Consumption by Region (2021-2026) & (K Units)

Table 15. World Automotive IGBT Modules Consumption Forecast by Region (2027-2032) & (K Units)

Table 16. World Automotive IGBT Modules Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Automotive IGBT Modules Producers in 2025

Table 18. World Automotive IGBT Modules Production by Manufacturer (2021-2026) & (K Units)

Table 19. Production Market Share of Key Automotive IGBT Modules Producers in 2025

Table 20. World Automotive IGBT Modules Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Automotive IGBT Modules Company Evaluation Quadrant

Table 22. World Automotive IGBT Modules Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Automotive IGBT Modules Production Site of Key Manufacturer

Table 24. Automotive IGBT Modules Market: Company Product Type Footprint

Table 25. Automotive IGBT Modules Market: Company Product Application Footprint

Table 26. Automotive IGBT Modules Competitive Factors

Table 27. Automotive IGBT Modules New Entrant and Capacity Expansion Plans

Table 28. Automotive IGBT Modules Mergers & Acquisitions Activity

Table 29. United States VS China Automotive IGBT Modules Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Automotive IGBT Modules Production Comparison, (2021 & 2025 & 2032) & (K Units)

Table 31. United States VS China Automotive IGBT Modules Consumption Comparison, (2021 & 2025 & 2032) & (K Units)

Table 32. United States Based Automotive IGBT Modules Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Automotive IGBT Modules Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Automotive IGBT Modules Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Automotive IGBT Modules Production (2021-2026) & (K Units)

Table 36. United States Based Manufacturers Automotive IGBT Modules Production Market Share (2021-2026)

Table 37. China Based Automotive IGBT Modules Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Automotive IGBT Modules Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Automotive IGBT Modules Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Automotive IGBT Modules Production, (2021-2026) & (K Units)

Table 41. China Based Manufacturers Automotive IGBT Modules Production Market Share (2021-2026)

Table 42. Rest of World Based Automotive IGBT Modules Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Automotive IGBT Modules Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Automotive IGBT Modules Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Automotive IGBT Modules Production, (2021-2026) & (K Units)

Table 46. Rest of World Based Manufacturers Automotive IGBT Modules Production Market Share (2021-2026)

Table 47. World Automotive IGBT Modules Production Value By Voltage, (USD Million), 2021 & 2025 & 2032

Table 48. World Automotive IGBT Modules Production By Voltage (2021-2026) & (K Units)

Table 49. World Automotive IGBT Modules Production By Voltage (2027-2032) & (K Units)

Table 50. World Automotive IGBT Modules Production Value By Voltage (2021-2026) & (USD Million)

Table 51. World Automotive IGBT Modules Production Value By Voltage (2027-2032) & (USD Million)

Table 52. World Automotive IGBT Modules Average Price By Voltage (2021-2026) & (US\$/Unit)

Table 53. World Automotive IGBT Modules Average Price By Voltage (2027-2032) & (US\$/Unit)

Table 54. World Automotive IGBT Modules Production Value by EV Type, (USD Million), 2021 & 2025 & 2032

Table 55. World Automotive IGBT Modules Production by EV Type (2021-2026) & (K Units)

Table 56. World Automotive IGBT Modules Production by EV Type (2027-2032) & (K Units)

Table 57. World Automotive IGBT Modules Production Value by EV Type (2021-2026) & (USD Million)

Table 58. World Automotive IGBT Modules Production Value by EV Type (2027-2032) & (USD Million)

Table 59. World Automotive IGBT Modules Average Price by EV Type (2021-2026) & (US\$/Unit)

Table 60. World Automotive IGBT Modules Average Price by EV Type (2027-2032) & (US\$/Unit)

Table 61. World Automotive IGBT Modules Production Value by Application, (USD

Million), 2021 & 2025 & 2032

Table 62. World Automotive IGBT Modules Production by Application (2021-2026) & (K Units)

Table 63. World Automotive IGBT Modules Production by Application (2027-2032) & (K Units)

Table 64. World Automotive IGBT Modules Production Value by Application (2021-2026) & (USD Million)

Table 65. World Automotive IGBT Modules Production Value by Application (2027-2032) & (USD Million)

Table 66. World Automotive IGBT Modules Average Price by Application (2021-2026) & (US\$/Unit)

Table 67. World Automotive IGBT Modules Average Price by Application (2027-2032) & (US\$/Unit)

Table 68. Infineon Basic Information, Manufacturing Base and Competitors

Table 69. Infineon Major Business

Table 70. Infineon Automotive IGBT Modules Product and Services

Table 71. Infineon Automotive IGBT Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 72. Infineon Recent Developments/Updates

Table 73. Infineon Competitive Strengths & Weaknesses

Table 74. Mitsubishi Electric Basic Information, Manufacturing Base and Competitors

Table 75. Mitsubishi Electric Major Business

Table 76. Mitsubishi Electric Automotive IGBT Modules Product and Services

Table 77. Mitsubishi Electric Automotive IGBT Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 78. Mitsubishi Electric Recent Developments/Updates

Table 79. Mitsubishi Electric Competitive Strengths & Weaknesses

Table 80. Fuji Electric Basic Information, Manufacturing Base and Competitors

Table 81. Fuji Electric Major Business

Table 82. Fuji Electric Automotive IGBT Modules Product and Services

Table 83. Fuji Electric Automotive IGBT Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 84. Fuji Electric Recent Developments/Updates

Table 85. Fuji Electric Competitive Strengths & Weaknesses

Table 86. Zhuzhou CRRC Times Electric Basic Information, Manufacturing Base and Competitors

Table 87. Zhuzhou CRRC Times Electric Major Business

Table 88. Zhuzhou CRRC Times Electric Automotive IGBT Modules Product and

Services

Table 89. Zhuzhou CRRC Times Electric Automotive IGBT Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 90. Zhuzhou CRRC Times Electric Recent Developments/Updates

Table 91. Zhuzhou CRRC Times Electric Competitive Strengths & Weaknesses

Table 92. BYD Semiconductor Basic Information, Manufacturing Base and Competitors

Table 93. BYD Semiconductor Major Business

Table 94. BYD Semiconductor Automotive IGBT Modules Product and Services

Table 95. BYD Semiconductor Automotive IGBT Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 96. BYD Semiconductor Recent Developments/Updates

Table 97. BYD Semiconductor Competitive Strengths & Weaknesses

Table 98. Semikron Danfoss Basic Information, Manufacturing Base and Competitors

Table 99. Semikron Danfoss Major Business

Table 100. Semikron Danfoss Automotive IGBT Modules Product and Services

Table 101. Semikron Danfoss Automotive IGBT Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 102. Semikron Danfoss Recent Developments/Updates

Table 103. Semikron Danfoss Competitive Strengths & Weaknesses

Table 104. StarPower Basic Information, Manufacturing Base and Competitors

Table 105. StarPower Major Business

Table 106. StarPower Automotive IGBT Modules Product and Services

Table 107. StarPower Automotive IGBT Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 108. StarPower Recent Developments/Updates

Table 109. StarPower Competitive Strengths & Weaknesses

Table 110. onsemi Basic Information, Manufacturing Base and Competitors

Table 111. onsemi Major Business

Table 112. onsemi Automotive IGBT Modules Product and Services

Table 113. onsemi Automotive IGBT Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 114. onsemi Recent Developments/Updates

Table 115. onsemi Competitive Strengths & Weaknesses

Table 116. Denso Basic Information, Manufacturing Base and Competitors

Table 117. Denso Major Business

Table 118. Denso Automotive IGBT Modules Product and Services

Table 119. Denso Automotive IGBT Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 120. Denso Recent Developments/Updates

Table 121. Denso Competitive Strengths & Weaknesses

Table 122. Hangzhou Silan Microelectronics Basic Information, Manufacturing Base and Competitors

Table 123. Hangzhou Silan Microelectronics Major Business

Table 124. Hangzhou Silan Microelectronics Automotive IGBT Modules Product and Services

Table 125. Hangzhou Silan Microelectronics Automotive IGBT Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 126. Hangzhou Silan Microelectronics Recent Developments/Updates

Table 127. Hangzhou Silan Microelectronics Competitive Strengths & Weaknesses

Table 128. Bosch Basic Information, Manufacturing Base and Competitors

Table 129. Bosch Major Business

Table 130. Bosch Automotive IGBT Modules Product and Services

Table 131. Bosch Automotive IGBT Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 132. Bosch Recent Developments/Updates

Table 133. Bosch Competitive Strengths & Weaknesses

Table 134. United Nova Technology (UNT) Basic Information, Manufacturing Base and Competitors

Table 135. United Nova Technology (UNT) Major Business

Table 136. United Nova Technology (UNT) Automotive IGBT Modules Product and Services

Table 137. United Nova Technology (UNT) Automotive IGBT Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 138. United Nova Technology (UNT) Recent Developments/Updates

Table 139. United Nova Technology (UNT) Competitive Strengths & Weaknesses

Table 140. Microchip (Microsemi) Basic Information, Manufacturing Base and Competitors

Table 141. Microchip (Microsemi) Major Business

Table 142. Microchip (Microsemi) Automotive IGBT Modules Product and Services

Table 143. Microchip (Microsemi) Automotive IGBT Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 144. Microchip (Microsemi) Recent Developments/Updates

- Table 145. Microchip (Microsemi) Competitive Strengths & Weaknesses
- Table 146. Grecon Semiconductor (Shanghai) Basic Information, Manufacturing Base and Competitors
- Table 147. Grecon Semiconductor (Shanghai) Major Business
- Table 148. Grecon Semiconductor (Shanghai) Automotive IGBT Modules Product and Services
- Table 149. Grecon Semiconductor (Shanghai) Automotive IGBT Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 150. Grecon Semiconductor (Shanghai) Recent Developments/Updates
- Table 151. Grecon Semiconductor (Shanghai) Competitive Strengths & Weaknesses
- Table 152. GeePak Basic Information, Manufacturing Base and Competitors
- Table 153. GeePak Major Business
- Table 154. GeePak Automotive IGBT Modules Product and Services
- Table 155. GeePak Automotive IGBT Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 156. GeePak Recent Developments/Updates
- Table 157. GeePak Competitive Strengths & Weaknesses
- Table 158. Archimedes Semiconductor (Hefei) Basic Information, Manufacturing Base and Competitors
- Table 159. Archimedes Semiconductor (Hefei) Major Business
- Table 160. Archimedes Semiconductor (Hefei) Automotive IGBT Modules Product and Services
- Table 161. Archimedes Semiconductor (Hefei) Automotive IGBT Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 162. Archimedes Semiconductor (Hefei) Recent Developments/Updates
- Table 163. Archimedes Semiconductor (Hefei) Competitive Strengths & Weaknesses
- Table 164. Hefei Cpower Technology Basic Information, Manufacturing Base and Competitors
- Table 165. Hefei Cpower Technology Major Business
- Table 166. Hefei Cpower Technology Automotive IGBT Modules Product and Services
- Table 167. Hefei Cpower Technology Automotive IGBT Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 168. Hefei Cpower Technology Recent Developments/Updates
- Table 169. Hefei Cpower Technology Competitive Strengths & Weaknesses
- Table 170. ZhiXin Semiconductor Basic Information, Manufacturing Base and Competitors

Table 171. ZhiXin Semiconductor Major Business

Table 172. ZhiXin Semiconductor Automotive IGBT Modules Product and Services

Table 173. ZhiXin Semiconductor Automotive IGBT Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 174. ZhiXin Semiconductor Recent Developments/Updates

Table 175. ZhiXin Semiconductor Competitive Strengths & Weaknesses

Table 176. MacMic Science & Technolog Basic Information, Manufacturing Base and Competitors

Table 177. MacMic Science & Technolog Major Business

Table 178. MacMic Science & Technolog Automotive IGBT Modules Product and Services

Table 179. MacMic Science & Technolog Automotive IGBT Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 180. MacMic Science & Technolog Recent Developments/Updates

Table 181. MacMic Science & Technolog Competitive Strengths & Weaknesses

Table 182. Global Key Players of Automotive IGBT Modules Upstream (Raw Materials)

Table 183. Global Automotive IGBT Modules Typical Customers

Table 184. Automotive IGBT Modules Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Automotive IGBT Modules Picture

Figure 2. World Automotive IGBT Modules Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Automotive IGBT Modules Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Automotive IGBT Modules Production (2021-2032) & (K Units)

Figure 5. World Automotive IGBT Modules Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Automotive IGBT Modules Production Value Market Share by Region (2021-2032)

Figure 7. World Automotive IGBT Modules Production Market Share by Region (2021-2032)

Figure 8. North America Automotive IGBT Modules Production (2021-2032) & (K Units)

Figure 9. Europe Automotive IGBT Modules Production (2021-2032) & (K Units)

Figure 10. China Automotive IGBT Modules Production (2021-2032) & (K Units)

Figure 11. Japan Automotive IGBT Modules Production (2021-2032) & (K Units)

Figure 12. Automotive IGBT Modules Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Automotive IGBT Modules Consumption (2021-2032) & (K Units)

Figure 15. World Automotive IGBT Modules Consumption Market Share by Region (2021-2032)

Figure 16. United States Automotive IGBT Modules Consumption (2021-2032) & (K Units)

Figure 17. China Automotive IGBT Modules Consumption (2021-2032) & (K Units)

Figure 18. Europe Automotive IGBT Modules Consumption (2021-2032) & (K Units)

Figure 19. Japan Automotive IGBT Modules Consumption (2021-2032) & (K Units)

Figure 20. South Korea Automotive IGBT Modules Consumption (2021-2032) & (K Units)

Figure 21. ASEAN Automotive IGBT Modules Consumption (2021-2032) & (K Units)

Figure 22. India Automotive IGBT Modules Consumption (2021-2032) & (K Units)

Figure 23. Producer Shipments of Automotive IGBT Modules by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Automotive IGBT Modules Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Automotive IGBT Modules Markets in 2025

Figure 26. United States VS China: Automotive IGBT Modules Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Automotive IGBT Modules Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Automotive IGBT Modules Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Automotive IGBT Modules Production Market Share 2025

Figure 30. China Based Manufacturers Automotive IGBT Modules Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Automotive IGBT Modules Production Market Share 2025

Figure 32. World Automotive IGBT Modules Production Value By Voltage, (USD Million), 2021 & 2025 & 2032

Figure 33. World Automotive IGBT Modules Production Value Market Share By Voltage in 2025

Figure 34. 650V/750V IGBT Modules

Figure 35. 1200V IGBT Modules

Figure 36. World Automotive IGBT Modules Production Market Share By Voltage (2021-2032)

Figure 37. World Automotive IGBT Modules Production Value Market Share By Voltage (2021-2032)

Figure 38. World Automotive IGBT Modules Average Price By Voltage (2021-2032) & (US\$/Unit)

Figure 39. World Automotive IGBT Modules Production Value by EV Type, (USD Million), 2021 & 2025 & 2032

Figure 40. World Automotive IGBT Modules Production Value Market Share by EV Type in 2025

Figure 41. BEV

Figure 42. HEV/PHEV

Figure 43. World Automotive IGBT Modules Production Market Share by EV Type (2021-2032)

Figure 44. World Automotive IGBT Modules Production Value Market Share by EV Type (2021-2032)

Figure 45. World Automotive IGBT Modules Average Price by EV Type (2021-2032) & (US\$/Unit)

Figure 46. World Automotive IGBT Modules Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 47. World Automotive IGBT Modules Production Value Market Share by

Application in 2025

Figure 48. Electric Vehicle (EV) Traction Inverter

Figure 49. DC-DC, and OBC

Figure 50. Electric Vehicle (EV) Charging Station

Figure 51. World Automotive IGBT Modules Production Market Share by Application (2021-2032)

Figure 52. World Automotive IGBT Modules Production Value Market Share by Application (2021-2032)

Figure 53. World Automotive IGBT Modules Average Price by Application (2021-2032) & (US\$/Unit)

Figure 54. Automotive IGBT Modules Industry Chain

Figure 55. Automotive IGBT Modules Procurement Model

Figure 56. Automotive IGBT Modules Sales Model

Figure 57. Automotive IGBT Modules Sales Channels, Direct Sales, and Distribution

Figure 58. Methodology

Figure 59. Research Process and Data Source

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