

# Global Automotive IGBT Modules Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Automotive IGBT Modules market size was valued at US\$ 3581 million in 2025 and is forecast to a readjusted size of US\$ 8443 million by 2032 with a CAGR of 12.9% during review period.

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 AQG 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 AQG324 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 AQC 324 is designed to support (ECPE also runs dedicated tutorials on testing to AQC 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<sup>®</sup> Drive positioning (traction focus, scalable 750/1200 V classes, AQC324) and Semikron Danfoss' traction-oriented DCM<sup>®</sup> 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 is a detailed and comprehensive analysis for global Automotive IGBT Modules market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, By Voltage and by Application. As the market is

constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

**Key Features:**

Global Automotive IGBT Modules market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Automotive IGBT Modules market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Automotive IGBT Modules market size and forecasts, By Voltage and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Automotive IGBT Modules market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (US\$/Unit), 2021-2026

**The Primary Objectives in This Report Are:**

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Automotive IGBT Modules

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Automotive IGBT Modules market based on the following parameters - company overview, sales quantity, revenue, 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.

## **Market Segmentation**

Automotive IGBT Modules market is split By Voltage and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value By Voltage, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

### Market segment By Voltage

650V/750V IGBT Modules

1200V IGBT Modules

### Market segment by EV Type

BEV

HEV/PHEV

### Market segment by Application

Electric Vehicle (EV) Traction Inverter

DC-DC, and OBC

Electric Vehicle (EV) Charging Station

### Major players covered

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

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

**The content of the study subjects, includes a total of 15 chapters:**

Chapter 1, to describe Automotive IGBT Modules product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Automotive IGBT Modules, with price, sales quantity, revenue, and global market share of Automotive IGBT Modules from 2021 to 2026.

Chapter 3, the Automotive IGBT Modules competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Automotive IGBT Modules breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales By Voltage and by Application, with sales market share and growth rate By Voltage, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Automotive IGBT Modules market forecast, by regions, By Voltage, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Automotive IGBT Modules.

Chapter 14 and 15, to describe Automotive IGBT Modules sales channel, distributors, customers, research findings and conclusion.

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