

Global Automotive Power Device Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Automotive Power Device market size is expected to reach \$ 16716 million by 2032, rising at a market growth of 8.4% CAGR during the forecast period (2026-2032).

Automotive power semiconductor devices are automotive-grade power switching and power conversion components designed for vehicle electrification, high reliability and harsh operating environments. These devices perform key functions such as switching, rectification, inversion, voltage conversion, protection and power regulation. The market is built on mature silicon-based MOSFETs, IGBTs, power diodes and rectifiers, while SiC MOSFETs, SiC Schottky barrier diodes, SiC power modules and GaN power devices represent the major high-growth technology routes. Product forms include bare dies, discrete packages, power modules, intelligent power modules and customized automotive-qualified modules. Key technical parameters include voltage rating, on-resistance, switching loss, short-circuit withstand capability, thermal resistance, junction temperature, power cycling lifetime, insulation performance and compliance with automotive quality and reliability requirements. Major applications include traction inverters, on-board chargers, DC-DC converters, electric compressors, thermal management systems, battery management systems, high-voltage power distribution and 12V/48V automotive electrical loads.

The automotive power semiconductor device market is fundamentally driven by the rising need for reliable, efficient and compact power conversion in vehicle electrification. In internal combustion engine vehicles, power devices were mainly used in 12V electrical loads, body control, lighting, protection circuits and auxiliary motor control. In electric and hybrid vehicles, the value contribution has shifted toward traction inverters, on-board chargers, DC-DC converters, high-voltage thermal management systems and

high-voltage power distribution. Silicon MOSFETs and IGBTs still form the mature base of the market, with MOSFETs dominating low-voltage and medium-power applications and IGBTs remaining competitive in 400V platforms and cost-sensitive traction inverter designs. SiC MOSFETs and SiC power modules are gaining penetration in 800V platforms, premium BEVs, fast-charging systems, OBCs and high-power DC-DC converters. Automotive GaN power devices are still at an early stage, but they are becoming increasingly relevant for high-frequency, compact and high-power-density power conversion.

From a supply structure perspective, the market remains led by large European, Japanese and U.S. IDMs and power module companies. Leading players such as Infineon, STMicroelectronics, onsemi, ROHM, Mitsubishi Electric, Fuji Electric, Toshiba, Bosch, Wolfspeed and Microchip possess strong advantages in chip design, wafer manufacturing, automotive qualification, module packaging, customer design-in and long-term supply capability. European suppliers are strong in automotive customer access and module platforms, Japanese companies are competitive in IGBT, SiC and high-reliability packaging, while U.S. suppliers are important in SiC, MOSFET and wide-bandgap innovation. Chinese suppliers are expanding rapidly on the back of the world's largest NEV market, with StarPower, BYD Semiconductor, CRRC Times, Silan Microelectronics, Yangjie, BASiC Semiconductor and other companies increasing their presence in IGBT modules, SiC MOSFETs and SiC power modules. The difference between the broad longlist and the core formal list mainly reflects the gap between general power device capability and verified automotive-grade mass production.

From the demand side, new energy vehicles remain the most important growth engine for automotive power semiconductors. Traction inverters drive high-voltage module demand, while OBCs and DC-DC converters support growth in SiC diodes, SiC MOSFETs, superjunction MOSFETs and potentially GaN devices. Electric compressors, heat pumps, pumps, braking, steering, chassis and body systems provide a stable base for low- and medium-voltage MOSFET demand. In the near term, the market faces inventory correction, uneven EV growth, pricing pressure and SiC ASP erosion, but these factors mainly affect the timing of revenue recognition rather than the long-term electrification trend. After a weak 2025, the market is expected to recover gradually from 2026, supported by the expansion of 800V platforms, lower SiC costs, stronger Chinese local supply and continued growth in xEV semiconductor content.

From a technology perspective, the future market will not be a simple replacement of silicon by SiC. Instead, multiple technologies will coexist. Silicon MOSFETs will remain the mainstream solution for low-voltage high-current applications; IGBTs will continue to

serve cost-sensitive high-power platforms; SiC will expand in high-voltage, high-efficiency and high-power-density applications; GaN may first scale in OBCs, DC-DC converters, high-frequency power supplies and selected 48V architectures. Competitive differentiation will increasingly depend on the combined capability of device design, wafer manufacturing, module packaging, thermal management, automotive reliability and system-level co-development. Leading global players are reinforcing their positions through 200mm SiC capacity, automotive module platforms and long-term customer agreements, while Chinese suppliers are closing the gap through domestic OEM design-ins, fast iteration and local capacity expansion.

This report studies the global Automotive Power Device production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive Power Device 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 Power Device that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automotive Power Device total production and demand, 2021-2032, (Million Units)

Global Automotive Power Device total production value, 2021-2032, (USD Million)

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

Global Automotive Power Device consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: Automotive Power Device domestic production, consumption, key domestic manufacturers and share

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

Global Automotive Power Device production by Device Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global Automotive Power Device production by Vehicle Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global Automotive Power Device 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 STMicroelectronics, Infineon, Wolfspeed, Rohm, onsemi, BYD Semiconductor, Microchip (Microsemi), Mitsubishi Electric, Semikron Danfoss, Fuji Electric, 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 Power Device market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Million Units) and average price (US\$/Unit) by manufacturer, by Device Type, and by Vehicle 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 Power Device Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Automotive Power Device Market, Segmentation by Device Type:

Silicon MOSFETs

IGBTs

SiC MOSFETs

SiC Diodes

GaN Power Devices

Power Diodes and Rectifiers

IGBT Power Module

SiC Power Module

Other Power Devices

Global Automotive Power Device Market, Segmentation by Semiconductor Material:

Silicon-Based Power Devices

SiC-Based Power Devices

GaN-Based Power Devices

Global Automotive Power Device Market, Segmentation by Voltage Class:

Below 100V

100V-650V

650V-900V

900V-1200V

Above 1200V

Global Automotive Power Device Market, Segmentation by Vehicle Application:

Traction Inverter

On-board Charger

DC-DC Converter

Electric Compressor and Thermal Management

Battery and Power Distribution

Body, Chassis and Auxiliary Loads

Charging Infrastructure Interface

Companies Profiled:

STMicroelectronics

Infineon

Wolfspeed

Rohm

onsemi

BYD Semiconductor

Microchip (Microsemi)

Mitsubishi Electric

Semikron Danfoss

Fuji Electric

Navitas (GeneSiC)

Toshiba

Jiangsu Jiejie Microelectronics

Littelfuse

CETC 55

WeEn Semiconductors

BASiC Semiconductor

SemiQ

Diodes Incorporated

SanRex

Alpha & Omega Semiconductor

Bosch

GE Aerospace

KEC Corporation

Renesas Electronics

MagnaChip

Sanken Electric

Texas Instruments

PANJIT Group

Nexperia

Vishay Intertechnology

Zhuzhou CRRC Times Semiconductor

China Resources Microelectronics Limited

StarPower

Yangzhou Yangjie Electronic Technology

Guangdong AccoPower Semiconductor

Changzhou Galaxy Century Microelectronics

Hangzhou Silan Microelectronics

PN Junction Semiconductor (Hangzhou)

United Nova Technology (UNT)

InventChip Technology (IVCT)

Leadrive Technology

HAIMOSIC (SHANGHAI)

Suzhou Sko Semiconductor

Shenzhen AST Technology

Suzhou Xizhi Technology

Archimedes Semiconductor (Hefei)

Grecon Semiconductor (Shanghai)

Hebei Sinopack Electronic Technology

Denso

GeePak

Hitachi Energy

Minebea Power Semiconductor Device

ZhiXin Semiconductor

NJSM Electronics

Hefei Cpower Technology

MacMic Science & Technology

NCEPOWER

Key Questions Answered:

1. How big is the global Automotive Power Device market?
2. What is the demand of the global Automotive Power Device market?
3. What is the year over year growth of the global Automotive Power Device market?
4. What is the production and production value of the global Automotive Power Device market?
5. Who are the key producers in the global Automotive Power Device market?
6. What are the growth factors driving the market demand?

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