

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

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Abstracts

The global Automotive Power Module Packaging market size is expected to reach \$ 11328 million by 2032, rising at a market growth of 13.5% CAGR during the forecast period (2026-2032).

Automotive Power Module Packaging refers to the design, assembly, integration and qualification of automotive-grade power semiconductor modules used in electric and hybrid vehicle power electronics. The scope mainly covers the packaging of IGBTs, SiC MOSFETs, silicon MOSFETs, diodes and related power chips into high-reliability modules through die attach, soldering or silver sintering, ceramic substrate interconnection, wire bonding or copper clip interconnection, terminal integration, gel filling or transfer molding, insulation protection, thermal structure integration and automotive-grade reliability testing. These packaged modules are used in traction inverters, on-board chargers, DC/DC converters, electric compressors, fuel-cell boost converters and other vehicle power conversion systems. The value of the industry lies in enabling high current capability, high voltage insulation, low parasitic inductance, high thermal cycling reliability, compact power density and long-term automotive robustness.

Automotive power module packaging is no longer a conventional back-end packaging activity for power devices. It has become a core enabling platform for high-voltage vehicle power electronics. The transition from 400 V IGBT-based drivetrains to 800 V SiC-based architectures is reshaping module design, interconnection, thermal management and reliability requirements. Packaging technologies such as silver sintering, copper interconnection, double-sided cooling, transfer-molded modules, pin-fin baseplates and module-on-cooler integration are becoming more relevant as OEMs and Tier 1 suppliers pursue higher power density, lower losses and longer lifetime under harsh automotive operating conditions.

From a supply perspective, the global industry is structured around several groups of players. European and Japanese incumbents remain strong in automotive qualification, platform module design and long-term customer relationships. U.S. suppliers are more visible in SiC devices, power module offerings and outsourced packaging services. China is the fastest-expanding supply base, supported by a large domestic EV market, OEM localization strategies and increasing investment in SiC and IGBT module production lines. The industry longlist is therefore much broader than the core ranking list: some companies are established global module suppliers, while others are captive OEM/Tier 1 module producers, OSAT providers, power module foundries or emerging SiC module entrants.

Demand growth is mainly driven by electrified vehicles, especially traction inverters, on-board chargers, DC/DC converters and high-voltage auxiliary systems. The key structural driver is not only the increase in EV unit sales but also the rise in module value per vehicle as 800 V platforms, SiC adoption and integrated cooling architectures become more widely used. However, revenue growth will be moderated by ASP erosion, design standardization, stronger Chinese competition and the gradual commoditization of some IGBT module platforms. The most resilient suppliers will be those that combine chip access, package design capability, thermal simulation, automotive-grade manufacturing and proven reliability data.

Looking forward, competition will increasingly be shaped by vertical integration, regional supply chain localization and module platform partnerships. Automotive OEMs and Tier 1 suppliers are reducing reliance on a single overseas source, while module suppliers are expanding capacity and qualifying multiple package formats. OSAT companies are also moving into power module packaging as customers seek more flexible manufacturing models. The market outlook remains positive, but the competitive landscape will be more fragmented than the traditional power semiconductor market because captive production, joint ventures and regional module specialists will coexist with established global IDMs.

This report studies the global Automotive Power Module Packaging demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive Power Module Packaging, 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 Module

Packaging that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automotive Power Module Packaging total market, 2021-2032, (USD Million)

Global Automotive Power Module Packaging total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Automotive Power Module Packaging total market, key domestic companies, and share, (USD Million)

Global Automotive Power Module Packaging revenue by player, revenue and market share 2021-2026, (USD Million)

Global Automotive Power Module Packaging total market by Module Type, CAGR, 2021-2032, (USD Million)

Global Automotive Power Module Packaging total market by Vehicle Power Electronics Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Automotive Power Module Packaging market based on the following parameters - company overview, revenue, 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 Module Packaging market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Module Type, and by Vehicle Power Electronics 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 Module Packaging Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Automotive Power Module Packaging Market, Segmentation by Module Type:

IGBT Power Modules

SiC Power Modules

Other Power Modules

Global Automotive Power Module Packaging Market, Segmentation by Package Architecture:

Transfer-Molded Module

Gel-Filled Power Module

Global Automotive Power Module Packaging Market, Segmentation by Interconnection and Die Attach:

Solder Die Attach

Silver Sintering

Copper Sintering

Others

Global Automotive Power Module Packaging Market, Segmentation by Vehicle Power Electronics Application:

Traction Inverter Module

On-Board Charger Module

DC/DC Converter Module

Other Applications

Companies Profiled:

STMicroelectronics

Infineon

Wolfspeed

Rohm

onsemi

BYD Semiconductor

Microchip (Microsemi)

Mitsubishi Electric

Semikron Danfoss

Fuji Electric

Navitas (GeneSiC)

Toshiba

San'an Optoelectronics

Littelfuse

CETC 55

WeEn Semiconductors

BASiC Semiconductor

SemiQ

Diodes Incorporated

SanRex

Alpha & Omega Semiconductor

Bosch

GE Aerospace

KEC Corporation

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

Cisoid

SK keyfoundry

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

Alkaidsemi

Key Questions Answered

1. How big is the global Automotive Power Module Packaging market?
2. What is the demand of the global Automotive Power Module Packaging market?
3. What is the year over year growth of the global Automotive Power Module Packaging market?
4. What is the total value of the global Automotive Power Module Packaging market?
5. Who are the Major Players in the global Automotive Power Module Packaging market?
6. What are the growth factors driving the market demand?

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