

# Global IGBT-IPM Module Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global IGBT-IPM Module market size is expected to reach \$ 3621 million by 2032, rising at a market growth of 5.9% CAGR during the forecast period (2026-2032).

IGBT-IPM is essentially a smart power module built around IGBTs and anti-parallel diodes as the main switching devices, with gate drive, undervoltage protection, overcurrent/short-circuit protection, temperature monitoring, and fault output integrated into one package for three-phase inverter and motor-drive systems. In product terms, the global IGBT-IPM market has developed a clear hierarchy: compact module families such as Mini/Small DIIPM, CIPOS Mini, and SLLIMM mainly serve white goods and low-to-mid-power motor drives, while Large DIIPM, DIIPM+, CIPOS Maxi, and SLLIMM High Power address commercial air conditioning, servos, general-purpose inverters, and higher-power industrial applications. End-use applications are concentrated in air conditioners, refrigerators, washing machines, dishwashers, fans, pumps, air purifiers, HVAC, general industrial drives, servos, and selected automotive auxiliary e-drive systems. In value-chain terms, upstream consists mainly of silicon IGBT dies, driver ICs, and packaging materials; midstream consists of design, manufacturing, packaging, testing, and application support by IDMs and module suppliers; downstream is led by appliance, industrial-control, and automotive system manufacturers.

IGBT-IPM remains the unquestioned backbone of the global IPM market. According to the dataset you provided, the IGBT-IPM revenue share declines from 93.25% in 2021 to 85.82% in 2032, but it still remains far above MOSFET-IPM, SiC-IPM, and GaN-IPM, confirming that IGBT-based intelligent modules continue to dominate high-volume applications such as home appliances, HVAC, and low-/medium-voltage industrial drives because of their cost competitiveness, process maturity, supply-chain depth, and

long-proven reliability. Competitive dynamics are also evolving: global incumbents such as Mitsubishi Electric, Infineon, STMicroelectronics, onsemi, Fuji Electric, and ROHM still control the broadest platform portfolios and the strongest brand positions, but the market-share trend in your dataset shows that Chinese suppliers are scaling rapidly, especially in appliance and industrial IGBT-IPM, with companies such as Silan Micro and China Resources Microelectronics gaining visible ground. Regionally, the manufacturing center of gravity is also shifting sharply toward China, while Japan continues to retain strong technological and product-platform influence.

Looking ahead, the global IGBT-IPM industry is likely to follow a development path defined by continued expansion in mature mass-market applications, performance upgrades within established silicon platforms, and gradual pressure from wide-bandgap alternatives. On one side, regulatory pressure on motors and variable-speed drives remains supportive: the EU has established ecodesign requirements for electric motors and variable speed drives, and onsemi explicitly highlights IPMs as critical devices for inverter compressors and fans in heat-pump systems. On the other side, industrial automation continues to provide a durable demand base: IFR reports 542,076 industrial robots were installed globally in 2024, while the IEA reports that global electric-car sales exceeded 17 million in 2024, broadening demand for intelligent power modules in compressors, pumps, fans, onboard charging peripherals, and thermal-management systems. At the same time, SiC-IPM and GaN-IPM are beginning to penetrate higher-efficiency and higher-power-density applications, but under current industry conditions IGBT-IPM is still expected to remain the mainstream solution for a long period in 600/650 V and 1200 V classes—especially in home appliances, commercial HVAC, and general-purpose industrial inverter systems—because of its superior cost/performance balance and the completeness of its ecosystem.

This report studies the global IGBT-IPM Module production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for IGBT-IPM Module 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 IGBT-IPM Module that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global IGBT-IPM Module total production and demand, 2021-2032, (K Units)

Global IGBT-IPM Module total production value, 2021-2032, (USD Million)

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

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

U.S. VS China: IGBT-IPM Module domestic production, consumption, key domestic manufacturers and share

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

Global IGBT-IPM Module production by Voltage Class, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

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

This report profiles key players in the global IGBT-IPM Module 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 Mitsubishi Electric, Hangzhou Silan Microelectronics, Sanken Electric, Fuji Electric, onsemi, Infineon, China Resources Microelectronics Limited, Rohm, STMicroelectronics, Semikron Danfoss, 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 IGBT-IPM Module 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 Class, 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 IGBT-IPM Module Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global IGBT-IPM Module Market, Segmentation by Voltage Class:

600V/650V IGBT-IPM

1200V IGBT-IPM

Global IGBT-IPM Module Market, Segmentation by Package/Mounting:

DBC-Based IPM

Transfer/Full-Molded IPM

Global IGBT-IPM Module Market, Segmentation by Integration Level:

Standard IPM

## System-Level IPM

### Global IGBT-IPM Module Market, Segmentation by Application:

Home Appliance

Industrial Motor

Automotive

Others

### Companies Profiled:

Mitsubishi Electric

Hangzhou Silan Microelectronics

Sanken Electric

Fuji Electric

onsemi

Infineon

China Resources Microelectronics Limited

Rohm

STMicroelectronics

Semikron Danfoss

BYD Semiconductor

Zhuhai Gree Xinyuan Electronics

StarPower

Alpha & Omega Semiconductor

Jilin Sino-Microelectronics

Shenzhen Invsemi Technology

Fortior Tech

Hisense Power Semiconductor

Cissoid

Changzhou Galaxy Century Microelectronics

Texas Instruments (TI)

Raon Semiconductor

Apex Microtechnology

PlutoChip

Shenzhen Fine Mad Electronics

QPT

NCEPOWER

### **Key Questions Answered:**

1. How big is the global IGBT-IPM Module market?
2. What is the demand of the global IGBT-IPM Module market?
3. What is the year over year growth of the global IGBT-IPM Module market?
4. What is the production and production value of the global IGBT-IPM Module market?
5. Who are the key producers in the global IGBT-IPM Module market?

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

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