

# Global IGBT Module for New Energy Vehicle (NEV) Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global IGBT Module for New Energy Vehicle (NEV) 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).

IGBT Modules for New Energy Vehicles (NEVs) are automotive-qualified power modules that integrate multiple silicon IGBT chips and freewheeling diodes (often with NTC temperature sensing and low-inductance internal layout) to form the switching ?engine? of NEV power conversion?most notably the main traction inverter, which converts battery DC into AC for the e-motor and supports regenerative operation. Compared with general industrial IGBT modules, NEV-grade modules are engineered around lifetime and harsh-environment requirements (power cycling / thermal cycling, vibration, humidity) and are increasingly aligned with industry qualification practices such as ECPE AQG 324, which targets power modules used in automotive converter units. In product typing, the mainstream NEV module families cluster around 750 V and 1200 V classes (to match 400 V?800 V vehicle architectures), and are offered as standard inverter building blocks (e.g., six-pack / three-phase bridge, half-bridge variants) on scalable package footprints.

In terms of global market status and applications, NEV IGBT modules remain a large-volume solution for a wide range of BEVs (especially cost-optimized platforms) and for HEV/PHEV traction systems, even as SiC grows rapidly in premium-efficiency designs. The demand base is anchored by EV scale: IEA reports electric car sales topped 17 million in 2024, and news-tracked registrations suggest continued growth into 2025 (with forecasts of slower growth in 2026 amid policy and regional demand shifts). While the traction inverter is the main value pool, NEV IGBT modules also appear in auxiliary motor inverters (e-compressor, pumps, fans) and certain high-voltage conversion stages depending on OEM architecture and cost/efficiency targets. From the supply side, leading global and regional suppliers emphasize platformized NEV lines: Infineon

positions HybridPACK? Drive as a scalable 750 V / 1200 V traction module family with AQG324 qualification, Semikron Danfoss positions DCM? as a traction platform scalable across 750?1200 V and wide current ranges, and CRRC Times Electric/Dynex highlight EV IGBT ranges spanning 750?1200 V with both flat baseplate and pin-fin variants for different power/cooling needs.

Looking forward, the key trends are: (1) higher power density via direct liquid cooling, optimized thermal stacks, and lower stray inductance; (2) longer lifetime via stronger interconnect/attach and more robust substrate/material choices; and (3) ?system-ready? qualification and testing standardization across OEM?Tier1?module supply chains. Fuji Electric?s automotive IGBT materials, for example, explicitly link ?downsizing? to direct liquid-cooling structures as a route to lower thermal resistance and higher module compactness. Competitive dynamics are therefore shifting from pure silicon performance to package + cooling + lifetime modelling + automotive qualification + scale manufacturing; at the same time, the long-term coexistence with SiC drives more hybrid roadmaps (Si IGBT plus SiC diodes, or parallel platform families offering both). Along the value chain, upstream is silicon wafers and IGBT/diode front-end manufacturing; midstream is module packaging (ceramic substrates, baseplate/direct-cooling plates, interconnect/encapsulation, test and reliability qualification); and downstream is inverter/PCU makers and OEMs that validate thermal management, lifetime, and vehicle-level performance?so ?winning? suppliers are those who can deliver qualified, scalable traction platforms with proven lifetime under real drive cycles. This report studies the global IGBT Module for New Energy Vehicle (NEV) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for IGBT Module for New Energy Vehicle (NEV) 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 Module for New Energy Vehicle (NEV) that contribute to its increasing demand across many markets.

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

Global IGBT Module for New Energy Vehicle (NEV) total production and demand, 2021-2032, (K Units)

Global IGBT Module for New Energy Vehicle (NEV) total production value, 2021-2032, (USD Million)

Global IGBT Module for New Energy Vehicle (NEV) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global IGBT Module for New Energy Vehicle (NEV) consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: IGBT Module for New Energy Vehicle (NEV) domestic production, consumption, key domestic manufacturers and share

Global IGBT Module for New Energy Vehicle (NEV) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global IGBT Module for New Energy Vehicle (NEV) production By Voltage, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global IGBT Module for New Energy Vehicle (NEV) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global IGBT Module for New Energy Vehicle (NEV) 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 IGBT Module for New Energy Vehicle (NEV) 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 IGBT Module for New Energy Vehicle (NEV) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global IGBT Module for New Energy Vehicle (NEV) Market, Segmentation By Voltage:

650V/750V IGBT Modules

1200V IGBT Modules

Global IGBT Module for New Energy Vehicle (NEV) Market, Segmentation by EV Type:

BEV

HEV/PHEV

Global IGBT Module for New Energy Vehicle (NEV) 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 IGBT Module for New Energy Vehicle (NEV) market?
2. What is the demand of the global IGBT Module for New Energy Vehicle (NEV) market?
3. What is the year over year growth of the global IGBT Module for New Energy Vehicle (NEV) market?
4. What is the production and production value of the global IGBT Module for New Energy Vehicle (NEV) market?
5. Who are the key producers in the global IGBT Module for New Energy Vehicle (NEV)

market?

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

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