

# Global IGBT Module for New Energy Vehicle (NEV) 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 IGBT Module for New Energy Vehicle (NEV) 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.

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<sup>2</sup> Drive as a scalable 750 V / 1200 V traction module family with AQC324 qualification, Semikron Danfoss positions DCM<sup>2</sup> 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 Tier 1 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 is a detailed and comprehensive analysis for global IGBT Module for New Energy Vehicle (NEV) 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 IGBT Module for New Energy Vehicle (NEV) market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices

(US\$/Unit), 2021-2032

Global IGBT Module for New Energy Vehicle (NEV) 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 IGBT Module for New Energy Vehicle (NEV) 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 IGBT Module for New Energy Vehicle (NEV) 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 IGBT Module for New Energy Vehicle (NEV)

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 IGBT Module for New Energy Vehicle (NEV) 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**

IGBT Module for New Energy Vehicle (NEV) 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 IGBT Module for New Energy Vehicle (NEV) product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of IGBT Module for New Energy Vehicle (NEV), with price, sales quantity, revenue, and global market share of IGBT Module for New Energy Vehicle (NEV) from 2021 to 2026.

Chapter 3, the IGBT Module for New Energy Vehicle (NEV) competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the IGBT Module for New Energy Vehicle (NEV) 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 IGBT Module for New Energy Vehicle (NEV) 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 IGBT Module for New Energy Vehicle (NEV).

Chapter 14 and 15, to describe IGBT Module for New Energy Vehicle (NEV) sales channel, distributors, customers, research findings and conclusion.

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