

Global Intelligent Power Modules (IPM) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Intelligent Power Modules (IPM) market size is expected to reach \$ 4220 million by 2032, rising at a market growth of 6.1% CAGR during the forecast period (2026-2032).

Intelligent Power Modules (IPMs) are best understood as highly integrated power-electronics building blocks that combine power switches, gate-drive circuitry, and core protection functions inside one module package for inverter and motor-drive systems. In commercial practice, the main product categories are IGBT-IPM, MOSFET-IPM, SiC-IPM, and GaN-IPM. Their application base is still centered on variable-speed motor control: Infineon positions CIPOS™ IPMs for roughly 20 W to 5 kW across dishwashers, fans, air conditioners, washing machines, refrigerators, air purifiers, HVAC, and industrial drives; onsemi positions IPMs for consumer, industrial, and automotive applications across about 50 W to 10 kW; ST's SLLIMM family targets appliance and industrial motor drives; and TI's 650 V three-phase GaN IPM shows that the category is now extending into next-generation high-efficiency motor platforms. From an industry-chain perspective, upstream is mainly power semiconductor dies, driver/control ICs, and packaging materials; midstream is module design, manufacturing, packaging, testing, and application support by IDMs and module specialists; downstream is concentrated in home appliances, industrial control, automotive systems, and selected energy or specialty equipment.

IGBT-IPM remains the dominant product type throughout the forecast period, but its revenue share declines from 93.25% in 2021 to 85.82% in 2032, while MOSFET-IPM gains share and SiC-/GaN-IPM move from niche positions into visible commercialization. By application, home appliances remain the largest demand base, but automotive is the strongest growth engine, and industrial control stays as a stable

second pillar. Competition is also being reshaped: in the supplied dataset, Mitsubishi Electric leads the market in the early years, but by 2026 Silan Micro rises to the top position, while China Resources Microelectronics also expands rapidly, indicating that the market is shifting from a historically Japan/Western-led structure toward a dual-pole pattern combining global incumbents and fast-scaling Chinese suppliers. That market evolution is consistent with what leading suppliers are doing in practice: Mitsubishi Electric has launched Full-SiC and Hybrid-SiC SLIMDIP samples for appliances, onsemi has introduced 1200 V SiC SPM 31 IPMs, TI has commercialized a 650 V three-phase GaN IPM, and Infineon is pushing more integrated motor-control-plus-IPM platforms through iMOTION™.

At the regional and strategic level, our report shows an especially sharp production shift toward China, while Japan, Europe, and North America lose share over time; this implies that the industry's manufacturing center of gravity is moving decisively into China even as Europe and Japan remain important for high-specification demand and technology benchmarking. The main growth drivers are also clear. First, regulatory pressure on electric motors and variable-speed drives supports continued inverter penetration, especially in HVAC and industrial systems under frameworks such as EU Ecodesign Regulation 2019/1781. Second, electric-vehicle growth is broadening IPM demand from traction-adjacent systems into compressors, pumps, fans, onboard charging peripherals, and thermal management; the IEA reports that global electric-car sales exceeded 17 million in 2024, surpassing 20% of new-car sales. Third, industrial automation remains a major structural driver: IFR reports 542,076 industrial robots were installed globally in 2024. Fourth, home appliances and heat pumps remain the industry's most stable volume base, and suppliers such as onsemi explicitly position IPMs as key components in inverter compressors and fans for heat-pump systems. Taken together, the global IPM industry is moving toward higher integration, smaller packages, more software/tool support, and a gradual widening from silicon-dominated mass markets toward SiC and GaN in higher-efficiency and higher-power-density applications, while future growth will be increasingly determined by automotive electrification, industrial automation, appliance/HVAC inverter upgrades, and the continued build-out of China's domestic supply chain.

This report studies the global Intelligent Power Modules (IPM) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Intelligent Power Modules (IPM) 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 Intelligent Power Modules (IPM) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Intelligent Power Modules (IPM) total production and demand, 2021-2032, (K Units)

Global Intelligent Power Modules (IPM) total production value, 2021-2032, (USD Million)

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

Global Intelligent Power Modules (IPM) consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Intelligent Power Modules (IPM) domestic production, consumption, key domestic manufacturers and share

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

Global Intelligent Power Modules (IPM) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Intelligent Power Modules (IPM) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Intelligent Power Modules (IPM) 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 Intelligent Power Modules (IPM) 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 Type, 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 Intelligent Power Modules (IPM) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Intelligent Power Modules (IPM) Market, Segmentation by Type:

IGBT-IPM

MOSFET-IPM

SiC-IPM

GaN-IPM

Global Intelligent Power Modules (IPM) Market, Segmentation by Voltage Rating:

600V/650V IPM

1200V IPM

100–600V IPM

Global Intelligent Power Modules (IPM) Market, Segmentation by Package Type:

DBC-Based IPM

Transfer/Full-Molded IPM

Global Intelligent Power Modules (IPM) Market, Segmentation by Integration Level:

Standard IPM

System-Level IPM

Global Intelligent Power Modules (IPM) 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 Intelligent Power Modules (IPM) market?
2. What is the demand of the global Intelligent Power Modules (IPM) market?
3. What is the year over year growth of the global Intelligent Power Modules (IPM) market?
4. What is the production and production value of the global Intelligent Power Modules (IPM) market?
5. Who are the key producers in the global Intelligent Power Modules (IPM) market?
6. What are the growth factors driving the market demand?

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