

Global New Energy Vehicle Power Chip 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 New Energy Vehicle Power Chip market size was valued at US\$ 4952 million in 2025 and is forecast to a readjusted size of US\$ 17665 million by 2032 with a CAGR of 20.1% during review period.

New Energy Vehicle Power Chips are core semiconductor devices used in the power electronics systems of battery electric vehicles, plug-in hybrid electric vehicles, and extended-range electric vehicles, where they perform essential functions including power conversion, energy control, and electrical management. These chips are widely deployed in traction inverters, onboard chargers, DC/DC converters, auxiliary power supplies for battery management systems, electric compressors, electric power steering systems, and high-voltage power distribution units. They are designed to address the demanding requirements of new energy vehicles under high-voltage, high-current, and high-frequency operating conditions, helping improve energy conversion efficiency, reduce power loss and heat generation, enhance system compactness, and ensure automotive-grade reliability over long service cycles. The development of new energy vehicle power chips has closely followed the electrification of the automotive industry. Early generations were mainly based on silicon IGBT and MOSFET technologies for motor drive and basic power conversion, while the shift toward higher-voltage vehicle platforms, faster charging systems, and more efficient drivetrains has accelerated the adoption of advanced wide-bandgap semiconductor materials such as silicon carbide. As a result, the industry is moving toward higher efficiency, higher switching frequency, and smaller, lighter, and more integrated vehicle power systems. Upstream of this industry are key materials such as silicon wafers, silicon carbide substrates, epitaxial wafers, photoresists, masks, electronic gases, wet chemicals, and sputtering targets,

together with supporting components including leadframes, bonding wires, package substrates, ceramic substrates, thermal interface materials, encapsulation resins, and connectors, as well as semiconductor manufacturing equipment and process technologies used in lithography, etching, ion implantation, thin-film deposition, dicing, packaging, and testing. In 2025, the global production capacity of new energy vehicle power chips is estimated at approximately 450 million units, while sales volume is expected to reach about 367 million units. The average selling price is around USD 13.1 per unit, and the gross profit margin of manufacturers is estimated to range from 30% to 40%.

The new energy vehicle power chip market is now moving from a phase driven mainly by electrification penetration into one shaped by higher-voltage architectures, platform upgrading, and parallel technology adoption. Traction inverters, onboard chargers, DC/DC converters, and high-voltage power distribution units remain the most important application areas. IGBTs still retain a broad base in mainstream vehicle platforms, while silicon carbide is accelerating its penetration in premium vehicles, 800V systems, and efficiency-focused architectures. As automakers continue to push for longer driving range, faster charging, better thermal performance, and improved vehicle efficiency, power chips are becoming more deeply integrated with e-drive systems, charging systems, and the overall vehicle electrical architecture. As a result, competition is shifting away from standalone device specifications toward system-level compatibility, automotive-grade reliability, supply assurance, and co-development capability with vehicle manufacturers.

Looking ahead, the market is likely to evolve toward higher-voltage platforms, more efficient topologies, greater packaging integration, and a more structured division of roles among different semiconductor materials. As 800V and higher-voltage systems expand into a wider range of vehicle segments, SiC is expected to gain further ground in high-voltage, high-power applications such as traction inverters. At the same time, GaN is beginning to show complementary potential in onboard chargers and auxiliary power systems, suggesting that the future of vehicle power chips will not be defined by one material replacing all others, but by IGBT, SiC, and GaN being deployed according to power level, cost target, and application requirement. In parallel, leading suppliers are investing in 200mm SiC manufacturing, advanced packaging, and vertically integrated supply chains, highlighting that long-term competitiveness will depend on manufacturing consistency, cost reduction, delivery capability, and the ability to work with OEMs on next-generation vehicle platforms.

At the same time, the market still faces meaningful constraints. Automotive power chips

must meet extremely demanding standards in reliability, lifetime, consistency, and functional safety, which means qualification cycles are long and barriers to entry remain high. SiC offers strong advantages in efficiency and power density, but its broader adoption is still affected by substrate cost, manufacturing complexity, yield, and packaging economics, while IGBT continues to be highly competitive in cost-sensitive models and mature vehicle platforms. In addition, the market is influenced by fluctuations in vehicle demand, inventory corrections, price pressure, and the restructuring of global supply chains. This means suppliers must manage not only technology transitions, but also capacity utilization, customer relationships, regional manufacturing strategies, and supply resilience. Overall, the main growth drivers remain higher-voltage vehicles, faster charging, and efficiency optimization, while the key restraints lie in cost control, qualification timelines, and supply-chain maturity.

This report is a detailed and comprehensive analysis for global New Energy Vehicle Power Chip market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type 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 New Energy Vehicle Power Chip market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global New Energy Vehicle Power Chip 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 New Energy Vehicle Power Chip market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global New Energy Vehicle Power Chip 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:

Global New Energy Vehicle Power Chip Market 2026 by Manufacturers, Regions, Type and Application, Forecast to...

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for New Energy Vehicle Power Chip

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 New Energy Vehicle Power Chip 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 STMicroelectronics, Infineon, Wolfspeed, Rohm, onsemi, BYD Semiconductor, Microchip (Microsemi), Mitsubishi Electric (Vincotech), Semikron Danfoss, Fuji Electric, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

New Energy Vehicle Power Chip market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, 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 Type

SiC MOSFET Modules

SiC MOSFET Discretets

SiC Diode/SBD

Market segment by Wafer Size

4-inch SiC Power Chip

6-inch SiC Power Chip

8-inch SiC Power Chip

Market segment by Voltage Range

Below 650V SiC Power Chip

650V-1200V SiC Power Chip

Above 1200V SiC Power Chip

Market segment by Application

Motor Drive

Battery Management

Air Conditioning Drive

Others

Major players covered

STMicroelectronics

Infineon

Wolfspeed

Rohm

onsemi

BYD Semiconductor

Microchip (Microsemi)

Mitsubishi Electric (Vincotech)

Semikron Danfoss

Fuji Electric

Navitas (GeneSiC)

Toshiba

Qorvo (UnitedSiC)

San'an Optoelectronics

Littelfuse (IXYS)

CETC 55

WeEn Semiconductors

BASiC Semiconductor

SemiQ

Diodes Incorporated

SanRex

Alpha & Omega Semiconductor

Bosch

KEC Corporation

PANJIT Group

Nexperia

Vishay Intertechnology

Zhuzhou CRRC Times Electric

China Resources Microelectronics Limited

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 New Energy Vehicle Power Chip product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of New Energy Vehicle Power Chip, with price, sales quantity, revenue, and global market share of New Energy Vehicle Power Chip from 2021 to 2026.

Chapter 3, the New Energy Vehicle Power Chip competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the New Energy Vehicle Power Chip 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 Type and by Application, with sales market share and growth rate by Type, 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 New Energy Vehicle Power Chip market forecast, by regions, by Type, 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 New Energy Vehicle Power Chip.

Chapter 14 and 15, to describe New Energy Vehicle Power Chip sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Type

1.3.1 Overview: Global New Energy Vehicle Power Chip Consumption Value by Type: 2021 Versus 2025 Versus 2032

1.3.2 SiC MOSFET Modules

1.3.3 SiC MOSFET Discretets

1.3.4 SiC Diode/SBD

1.4 Market Analysis by Wafer Size

1.4.1 Overview: Global New Energy Vehicle Power Chip Consumption Value by Wafer Size: 2021 Versus 2025 Versus 2032

1.4.2 4-inch SiC Power Chip

1.4.3 6-inch SiC Power Chip

1.4.4 8-inch SiC Power Chip

1.5 Market Analysis by Voltage Range

1.5.1 Overview: Global New Energy Vehicle Power Chip Consumption Value by Voltage Range: 2021 Versus 2025 Versus 2032

1.5.2 Below 650V SiC Power Chip

1.5.3 650V-1200V SiC Power Chip

1.5.4 Above 1200V SiC Power Chip

1.6 Market Analysis by Application

1.6.1 Overview: Global New Energy Vehicle Power Chip Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.6.2 Motor Drive

1.6.3 Battery Management

1.6.4 Air Conditioning Drive

1.6.5 Others

1.7 Global New Energy Vehicle Power Chip Market Size & Forecast

1.7.1 Global New Energy Vehicle Power Chip Consumption Value (2021 & 2025 & 2032)

1.7.2 Global New Energy Vehicle Power Chip Sales Quantity (2021-2032)

1.7.3 Global New Energy Vehicle Power Chip Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 STMicroelectronics

2.1.1 STMicroelectronics Details

2.1.2 STMicroelectronics Major Business

2.1.3 STMicroelectronics New Energy Vehicle Power Chip Product and Services

2.1.4 STMicroelectronics New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 STMicroelectronics Recent Developments/Updates

2.2 Infineon

2.2.1 Infineon Details

2.2.2 Infineon Major Business

2.2.3 Infineon New Energy Vehicle Power Chip Product and Services

2.2.4 Infineon New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 Infineon Recent Developments/Updates

2.3 Wolfspeed

2.3.1 Wolfspeed Details

2.3.2 Wolfspeed Major Business

2.3.3 Wolfspeed New Energy Vehicle Power Chip Product and Services

2.3.4 Wolfspeed New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 Wolfspeed Recent Developments/Updates

2.4 Rohm

2.4.1 Rohm Details

2.4.2 Rohm Major Business

2.4.3 Rohm New Energy Vehicle Power Chip Product and Services

2.4.4 Rohm New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 Rohm Recent Developments/Updates

2.5 onsemi

2.5.1 onsemi Details

2.5.2 onsemi Major Business

2.5.3 onsemi New Energy Vehicle Power Chip Product and Services

2.5.4 onsemi New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 onsemi Recent Developments/Updates

2.6 BYD Semiconductor

2.6.1 BYD Semiconductor Details

2.6.2 BYD Semiconductor Major Business

2.6.3 BYD Semiconductor New Energy Vehicle Power Chip Product and Services

2.6.4 BYD Semiconductor New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.6.5 BYD Semiconductor Recent Developments/Updates

2.7 Microchip (Microsemi)

2.7.1 Microchip (Microsemi) Details

2.7.2 Microchip (Microsemi) Major Business

2.7.3 Microchip (Microsemi) New Energy Vehicle Power Chip Product and Services

2.7.4 Microchip (Microsemi) New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.7.5 Microchip (Microsemi) Recent Developments/Updates

2.8 Mitsubishi Electric (Vincotech)

2.8.1 Mitsubishi Electric (Vincotech) Details

2.8.2 Mitsubishi Electric (Vincotech) Major Business

2.8.3 Mitsubishi Electric (Vincotech) New Energy Vehicle Power Chip Product and Services

2.8.4 Mitsubishi Electric (Vincotech) New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.8.5 Mitsubishi Electric (Vincotech) Recent Developments/Updates

2.9 Semikron Danfoss

2.9.1 Semikron Danfoss Details

2.9.2 Semikron Danfoss Major Business

2.9.3 Semikron Danfoss New Energy Vehicle Power Chip Product and Services

2.9.4 Semikron Danfoss New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.9.5 Semikron Danfoss Recent Developments/Updates

2.10 Fuji Electric

2.10.1 Fuji Electric Details

2.10.2 Fuji Electric Major Business

2.10.3 Fuji Electric New Energy Vehicle Power Chip Product and Services

2.10.4 Fuji Electric New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.10.5 Fuji Electric Recent Developments/Updates

2.11 Navitas (GeneSiC)

2.11.1 Navitas (GeneSiC) Details

2.11.2 Navitas (GeneSiC) Major Business

2.11.3 Navitas (GeneSiC) New Energy Vehicle Power Chip Product and Services

2.11.4 Navitas (GeneSiC) New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.11.5 Navitas (GeneSiC) Recent Developments/Updates

2.12 Toshiba

2.12.1 Toshiba Details

2.12.2 Toshiba Major Business

2.12.3 Toshiba New Energy Vehicle Power Chip Product and Services

2.12.4 Toshiba New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.12.5 Toshiba Recent Developments/Updates

2.13 Qorvo (UnitedSiC)

2.13.1 Qorvo (UnitedSiC) Details

2.13.2 Qorvo (UnitedSiC) Major Business

2.13.3 Qorvo (UnitedSiC) New Energy Vehicle Power Chip Product and Services

2.13.4 Qorvo (UnitedSiC) New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.13.5 Qorvo (UnitedSiC) Recent Developments/Updates

2.14 San'an Optoelectronics

2.14.1 San'an Optoelectronics Details

2.14.2 San'an Optoelectronics Major Business

2.14.3 San'an Optoelectronics New Energy Vehicle Power Chip Product and Services

2.14.4 San'an Optoelectronics New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.14.5 San'an Optoelectronics Recent Developments/Updates

2.15 Littelfuse (IXYS)

2.15.1 Littelfuse (IXYS) Details

2.15.2 Littelfuse (IXYS) Major Business

2.15.3 Littelfuse (IXYS) New Energy Vehicle Power Chip Product and Services

2.15.4 Littelfuse (IXYS) New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.15.5 Littelfuse (IXYS) Recent Developments/Updates

2.16 CETC

2.16.1 CETC 55 Details

2.16.2 CETC 55 Major Business

2.16.3 CETC 55 New Energy Vehicle Power Chip Product and Services

2.16.4 CETC 55 New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.16.5 CETC 55 Recent Developments/Updates

2.17 WeEn Semiconductors

2.17.1 WeEn Semiconductors Details

2.17.2 WeEn Semiconductors Major Business

2.17.3 WeEn Semiconductors New Energy Vehicle Power Chip Product and Services

2.17.4 WeEn Semiconductors New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.17.5 WeEn Semiconductors Recent Developments/Updates

2.18 BASiC Semiconductor

2.18.1 BASiC Semiconductor Details

2.18.2 BASiC Semiconductor Major Business

2.18.3 BASiC Semiconductor New Energy Vehicle Power Chip Product and Services

2.18.4 BASiC Semiconductor New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.18.5 BASiC Semiconductor Recent Developments/Updates

2.19 SemiQ

2.19.1 SemiQ Details

2.19.2 SemiQ Major Business

2.19.3 SemiQ New Energy Vehicle Power Chip Product and Services

2.19.4 SemiQ New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.19.5 SemiQ Recent Developments/Updates

2.20 Diodes Incorporated

2.20.1 Diodes Incorporated Details

2.20.2 Diodes Incorporated Major Business

2.20.3 Diodes Incorporated New Energy Vehicle Power Chip Product and Services

2.20.4 Diodes Incorporated New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.20.5 Diodes Incorporated Recent Developments/Updates

2.21 SanRex

2.21.1 SanRex Details

2.21.2 SanRex Major Business

2.21.3 SanRex New Energy Vehicle Power Chip Product and Services

2.21.4 SanRex New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.21.5 SanRex Recent Developments/Updates

2.22 Alpha & Omega Semiconductor

2.22.1 Alpha & Omega Semiconductor Details

2.22.2 Alpha & Omega Semiconductor Major Business

2.22.3 Alpha & Omega Semiconductor New Energy Vehicle Power Chip Product and Services

2.22.4 Alpha & Omega Semiconductor New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.22.5 Alpha & Omega Semiconductor Recent Developments/Updates

2.23 Bosch

2.23.1 Bosch Details

2.23.2 Bosch Major Business

2.23.3 Bosch New Energy Vehicle Power Chip Product and Services

2.23.4 Bosch New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.23.5 Bosch Recent Developments/Updates

2.24 KEC Corporation

2.24.1 KEC Corporation Details

2.24.2 KEC Corporation Major Business

2.24.3 KEC Corporation New Energy Vehicle Power Chip Product and Services

2.24.4 KEC Corporation New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.24.5 KEC Corporation Recent Developments/Updates

2.25 PANJIT Group

2.25.1 PANJIT Group Details

2.25.2 PANJIT Group Major Business

2.25.3 PANJIT Group New Energy Vehicle Power Chip Product and Services

2.25.4 PANJIT Group New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.25.5 PANJIT Group Recent Developments/Updates

2.26 Nexperia

2.26.1 Nexperia Details

2.26.2 Nexperia Major Business

2.26.3 Nexperia New Energy Vehicle Power Chip Product and Services

2.26.4 Nexperia New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.26.5 Nexperia Recent Developments/Updates

2.27 Vishay Intertechnology

2.27.1 Vishay Intertechnology Details

2.27.2 Vishay Intertechnology Major Business

2.27.3 Vishay Intertechnology New Energy Vehicle Power Chip Product and Services

2.27.4 Vishay Intertechnology New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.27.5 Vishay Intertechnology Recent Developments/Updates

2.28 Zhuzhou CRRC Times Electric

2.28.1 Zhuzhou CRRC Times Electric Details

2.28.2 Zhuzhou CRRC Times Electric Major Business

2.28.3 Zhuzhou CRRC Times Electric New Energy Vehicle Power Chip Product and

Services

2.28.4 Zhuzhou CRRC Times Electric New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.28.5 Zhuzhou CRRC Times Electric Recent Developments/Updates

2.29 China Resources Microelectronics Limited

2.29.1 China Resources Microelectronics Limited Details

2.29.2 China Resources Microelectronics Limited Major Business

2.29.3 China Resources Microelectronics Limited New Energy Vehicle Power Chip Product and Services

2.29.4 China Resources Microelectronics Limited New Energy Vehicle Power Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.29.5 China Resources Microelectronics Limited Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: NEW ENERGY VEHICLE POWER CHIP BY MANUFACTURER

3.1 Global New Energy Vehicle Power Chip Sales Quantity by Manufacturer (2021-2026)

3.2 Global New Energy Vehicle Power Chip Revenue by Manufacturer (2021-2026)

3.3 Global New Energy Vehicle Power Chip Average Price by Manufacturer (2021-2026)

3.4 Market Share Analysis (2025)

3.4.1 Producer Shipments of New Energy Vehicle Power Chip by Manufacturer Revenue (\$MM) and Market Share (%): 2025

3.4.2 Top 3 New Energy Vehicle Power Chip Manufacturer Market Share in 2025

3.4.3 Top 6 New Energy Vehicle Power Chip Manufacturer Market Share in 2025

3.5 New Energy Vehicle Power Chip Market: Overall Company Footprint Analysis

3.5.1 New Energy Vehicle Power Chip Market: Region Footprint

3.5.2 New Energy Vehicle Power Chip Market: Company Product Type Footprint

3.5.3 New Energy Vehicle Power Chip Market: Company Product Application Footprint

3.6 New Market Entrants and Barriers to Market Entry

3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

4.1 Global New Energy Vehicle Power Chip Market Size by Region

4.1.1 Global New Energy Vehicle Power Chip Sales Quantity by Region (2021-2032)

4.1.2 Global New Energy Vehicle Power Chip Consumption Value by Region (2021-2032)

- 4.1.3 Global New Energy Vehicle Power Chip Average Price by Region (2021-2032)
- 4.2 North America New Energy Vehicle Power Chip Consumption Value (2021-2032)
- 4.3 Europe New Energy Vehicle Power Chip Consumption Value (2021-2032)
- 4.4 Asia-Pacific New Energy Vehicle Power Chip Consumption Value (2021-2032)
- 4.5 South America New Energy Vehicle Power Chip Consumption Value (2021-2032)
- 4.6 Middle East & Africa New Energy Vehicle Power Chip Consumption Value (2021-2032)

5 MARKET SEGMENT BY TYPE

- 5.1 Global New Energy Vehicle Power Chip Sales Quantity by Type (2021-2032)
- 5.2 Global New Energy Vehicle Power Chip Consumption Value by Type (2021-2032)
- 5.3 Global New Energy Vehicle Power Chip Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

- 6.1 Global New Energy Vehicle Power Chip Sales Quantity by Application (2021-2032)
- 6.2 Global New Energy Vehicle Power Chip Consumption Value by Application (2021-2032)
- 6.3 Global New Energy Vehicle Power Chip Average Price by Application (2021-2032)

7 NORTH AMERICA

- 7.1 North America New Energy Vehicle Power Chip Sales Quantity by Type (2021-2032)
- 7.2 North America New Energy Vehicle Power Chip Sales Quantity by Application (2021-2032)
- 7.3 North America New Energy Vehicle Power Chip Market Size by Country
 - 7.3.1 North America New Energy Vehicle Power Chip Sales Quantity by Country (2021-2032)
 - 7.3.2 North America New Energy Vehicle Power Chip Consumption Value by Country (2021-2032)
 - 7.3.3 United States Market Size and Forecast (2021-2032)
 - 7.3.4 Canada Market Size and Forecast (2021-2032)
 - 7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

- 8.1 Europe New Energy Vehicle Power Chip Sales Quantity by Type (2021-2032)

8.2 Europe New Energy Vehicle Power Chip Sales Quantity by Application (2021-2032)

8.3 Europe New Energy Vehicle Power Chip Market Size by Country

8.3.1 Europe New Energy Vehicle Power Chip Sales Quantity by Country (2021-2032)

8.3.2 Europe New Energy Vehicle Power Chip Consumption Value by Country
(2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific New Energy Vehicle Power Chip Sales Quantity by Type (2021-2032)

9.2 Asia-Pacific New Energy Vehicle Power Chip Sales Quantity by Application
(2021-2032)

9.3 Asia-Pacific New Energy Vehicle Power Chip Market Size by Region

9.3.1 Asia-Pacific New Energy Vehicle Power Chip Sales Quantity by Region
(2021-2032)

9.3.2 Asia-Pacific New Energy Vehicle Power Chip Consumption Value by Region
(2021-2032)

9.3.3 China Market Size and Forecast (2021-2032)

9.3.4 Japan Market Size and Forecast (2021-2032)

9.3.5 South Korea Market Size and Forecast (2021-2032)

9.3.6 India Market Size and Forecast (2021-2032)

9.3.7 Southeast Asia Market Size and Forecast (2021-2032)

9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

10.1 South America New Energy Vehicle Power Chip Sales Quantity by Type
(2021-2032)

10.2 South America New Energy Vehicle Power Chip Sales Quantity by Application
(2021-2032)

10.3 South America New Energy Vehicle Power Chip Market Size by Country

10.3.1 South America New Energy Vehicle Power Chip Sales Quantity by Country
(2021-2032)

10.3.2 South America New Energy Vehicle Power Chip Consumption Value by
Country (2021-2032)

- 10.3.3 Brazil Market Size and Forecast (2021-2032)
- 10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

- 11.1 Middle East & Africa New Energy Vehicle Power Chip Sales Quantity by Type (2021-2032)
- 11.2 Middle East & Africa New Energy Vehicle Power Chip Sales Quantity by Application (2021-2032)
- 11.3 Middle East & Africa New Energy Vehicle Power Chip Market Size by Country
 - 11.3.1 Middle East & Africa New Energy Vehicle Power Chip Sales Quantity by Country (2021-2032)
 - 11.3.2 Middle East & Africa New Energy Vehicle Power Chip Consumption Value by Country (2021-2032)
 - 11.3.3 Turkey Market Size and Forecast (2021-2032)
 - 11.3.4 Egypt Market Size and Forecast (2021-2032)
 - 11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)
 - 11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

- 12.1 New Energy Vehicle Power Chip Market Drivers
- 12.2 New Energy Vehicle Power Chip Market Restraints
- 12.3 New Energy Vehicle Power Chip Trends Analysis
- 12.4 Porters Five Forces Analysis
 - 12.4.1 Threat of New Entrants
 - 12.4.2 Bargaining Power of Suppliers
 - 12.4.3 Bargaining Power of Buyers
 - 12.4.4 Threat of Substitutes
 - 12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

- 13.1 Raw Material of New Energy Vehicle Power Chip and Key Manufacturers
- 13.2 Manufacturing Costs Percentage of New Energy Vehicle Power Chip
- 13.3 New Energy Vehicle Power Chip Production Process
- 13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

14.1 Sales Channel

14.1.1 Direct to End-User

14.1.2 Distributors

14.2 New Energy Vehicle Power Chip Typical Distributors

14.3 New Energy Vehicle Power Chip Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

16.1 Methodology

16.2 Research Process and Data Source

16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global New Energy Vehicle Power Chip Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global New Energy Vehicle Power Chip Consumption Value by Wafer Size, (USD Million), 2021 & 2025 & 2032

Table 3. Global New Energy Vehicle Power Chip Consumption Value by Voltage Range, (USD Million), 2021 & 2025 & 2032

Table 4. Global New Energy Vehicle Power Chip Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 5. STMicroelectronics Basic Information, Manufacturing Base and Competitors

Table 6. STMicroelectronics Major Business

Table 7. STMicroelectronics New Energy Vehicle Power Chip Product and Services

Table 8. STMicroelectronics New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 9. STMicroelectronics Recent Developments/Updates

Table 10. Infineon Basic Information, Manufacturing Base and Competitors

Table 11. Infineon Major Business

Table 12. Infineon New Energy Vehicle Power Chip Product and Services

Table 13. Infineon New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 14. Infineon Recent Developments/Updates

Table 15. Wolfspeed Basic Information, Manufacturing Base and Competitors

Table 16. Wolfspeed Major Business

Table 17. Wolfspeed New Energy Vehicle Power Chip Product and Services

Table 18. Wolfspeed New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 19. Wolfspeed Recent Developments/Updates

Table 20. Rohm Basic Information, Manufacturing Base and Competitors

Table 21. Rohm Major Business

Table 22. Rohm New Energy Vehicle Power Chip Product and Services

Table 23. Rohm New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 24. Rohm Recent Developments/Updates

Table 25. onsemi Basic Information, Manufacturing Base and Competitors

- Table 26. onsemi Major Business
- Table 27. onsemi New Energy Vehicle Power Chip Product and Services
- Table 28. onsemi New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 29. onsemi Recent Developments/Updates
- Table 30. BYD Semiconductor Basic Information, Manufacturing Base and Competitors
- Table 31. BYD Semiconductor Major Business
- Table 32. BYD Semiconductor New Energy Vehicle Power Chip Product and Services
- Table 33. BYD Semiconductor New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 34. BYD Semiconductor Recent Developments/Updates
- Table 35. Microchip (Microsemi) Basic Information, Manufacturing Base and Competitors
- Table 36. Microchip (Microsemi) Major Business
- Table 37. Microchip (Microsemi) New Energy Vehicle Power Chip Product and Services
- Table 38. Microchip (Microsemi) New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 39. Microchip (Microsemi) Recent Developments/Updates
- Table 40. Mitsubishi Electric (Vincotech) Basic Information, Manufacturing Base and Competitors
- Table 41. Mitsubishi Electric (Vincotech) Major Business
- Table 42. Mitsubishi Electric (Vincotech) New Energy Vehicle Power Chip Product and Services
- Table 43. Mitsubishi Electric (Vincotech) New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 44. Mitsubishi Electric (Vincotech) Recent Developments/Updates
- Table 45. Semikron Danfoss Basic Information, Manufacturing Base and Competitors
- Table 46. Semikron Danfoss Major Business
- Table 47. Semikron Danfoss New Energy Vehicle Power Chip Product and Services
- Table 48. Semikron Danfoss New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 49. Semikron Danfoss Recent Developments/Updates
- Table 50. Fuji Electric Basic Information, Manufacturing Base and Competitors
- Table 51. Fuji Electric Major Business
- Table 52. Fuji Electric New Energy Vehicle Power Chip Product and Services

Table 53. Fuji Electric New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 54. Fuji Electric Recent Developments/Updates

Table 55. Navitas (GeneSiC) Basic Information, Manufacturing Base and Competitors

Table 56. Navitas (GeneSiC) Major Business

Table 57. Navitas (GeneSiC) New Energy Vehicle Power Chip Product and Services

Table 58. Navitas (GeneSiC) New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 59. Navitas (GeneSiC) Recent Developments/Updates

Table 60. Toshiba Basic Information, Manufacturing Base and Competitors

Table 61. Toshiba Major Business

Table 62. Toshiba New Energy Vehicle Power Chip Product and Services

Table 63. Toshiba New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 64. Toshiba Recent Developments/Updates

Table 65. Qorvo (UnitedSiC) Basic Information, Manufacturing Base and Competitors

Table 66. Qorvo (UnitedSiC) Major Business

Table 67. Qorvo (UnitedSiC) New Energy Vehicle Power Chip Product and Services

Table 68. Qorvo (UnitedSiC) New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 69. Qorvo (UnitedSiC) Recent Developments/Updates

Table 70. San'an Optoelectronics Basic Information, Manufacturing Base and Competitors

Table 71. San'an Optoelectronics Major Business

Table 72. San'an Optoelectronics New Energy Vehicle Power Chip Product and Services

Table 73. San'an Optoelectronics New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 74. San'an Optoelectronics Recent Developments/Updates

Table 75. Littelfuse (IXYS) Basic Information, Manufacturing Base and Competitors

Table 76. Littelfuse (IXYS) Major Business

Table 77. Littelfuse (IXYS) New Energy Vehicle Power Chip Product and Services

Table 78. Littelfuse (IXYS) New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Littelfuse (IXYS) Recent Developments/Updates

Table 80. CETC 55 Basic Information, Manufacturing Base and Competitors

Table 81. CETC 55 Major Business

Table 82. CETC 55 New Energy Vehicle Power Chip Product and Services

Table 83. CETC 55 New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 84. CETC 55 Recent Developments/Updates

Table 85. WeEn Semiconductors Basic Information, Manufacturing Base and Competitors

Table 86. WeEn Semiconductors Major Business

Table 87. WeEn Semiconductors New Energy Vehicle Power Chip Product and Services

Table 88. WeEn Semiconductors New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 89. WeEn Semiconductors Recent Developments/Updates

Table 90. BASiC Semiconductor Basic Information, Manufacturing Base and Competitors

Table 91. BASiC Semiconductor Major Business

Table 92. BASiC Semiconductor New Energy Vehicle Power Chip Product and Services

Table 93. BASiC Semiconductor New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 94. BASiC Semiconductor Recent Developments/Updates

Table 95. SemiQ Basic Information, Manufacturing Base and Competitors

Table 96. SemiQ Major Business

Table 97. SemiQ New Energy Vehicle Power Chip Product and Services

Table 98. SemiQ New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 99. SemiQ Recent Developments/Updates

Table 100. Diodes Incorporated Basic Information, Manufacturing Base and Competitors

Table 101. Diodes Incorporated Major Business

Table 102. Diodes Incorporated New Energy Vehicle Power Chip Product and Services

Table 103. Diodes Incorporated New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. Diodes Incorporated Recent Developments/Updates

Table 105. SanRex Basic Information, Manufacturing Base and Competitors

Table 106. SanRex Major Business

Table 107. SanRex New Energy Vehicle Power Chip Product and Services

Table 108. SanRex New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. SanRex Recent Developments/Updates

Table 110. Alpha & Omega Semiconductor Basic Information, Manufacturing Base and Competitors

Table 111. Alpha & Omega Semiconductor Major Business

Table 112. Alpha & Omega Semiconductor New Energy Vehicle Power Chip Product and Services

Table 113. Alpha & Omega Semiconductor New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 114. Alpha & Omega Semiconductor Recent Developments/Updates

Table 115. Bosch Basic Information, Manufacturing Base and Competitors

Table 116. Bosch Major Business

Table 117. Bosch New Energy Vehicle Power Chip Product and Services

Table 118. Bosch New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 119. Bosch Recent Developments/Updates

Table 120. KEC Corporation Basic Information, Manufacturing Base and Competitors

Table 121. KEC Corporation Major Business

Table 122. KEC Corporation New Energy Vehicle Power Chip Product and Services

Table 123. KEC Corporation New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 124. KEC Corporation Recent Developments/Updates

Table 125. PANJIT Group Basic Information, Manufacturing Base and Competitors

Table 126. PANJIT Group Major Business

Table 127. PANJIT Group New Energy Vehicle Power Chip Product and Services

Table 128. PANJIT Group New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 129. PANJIT Group Recent Developments/Updates

Table 130. Nexperia Basic Information, Manufacturing Base and Competitors

Table 131. Nexperia Major Business

Table 132. Nexperia New Energy Vehicle Power Chip Product and Services

Table 133. Nexperia New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

- Table 134. Nexperia Recent Developments/Updates
- Table 135. Vishay Intertechnology Basic Information, Manufacturing Base and Competitors
- Table 136. Vishay Intertechnology Major Business
- Table 137. Vishay Intertechnology New Energy Vehicle Power Chip Product and Services
- Table 138. Vishay Intertechnology New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 139. Vishay Intertechnology Recent Developments/Updates
- Table 140. Zhuzhou CRRC Times Electric Basic Information, Manufacturing Base and Competitors
- Table 141. Zhuzhou CRRC Times Electric Major Business
- Table 142. Zhuzhou CRRC Times Electric New Energy Vehicle Power Chip Product and Services
- Table 143. Zhuzhou CRRC Times Electric New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 144. Zhuzhou CRRC Times Electric Recent Developments/Updates
- Table 145. China Resources Microelectronics Limited Basic Information, Manufacturing Base and Competitors
- Table 146. China Resources Microelectronics Limited Major Business
- Table 147. China Resources Microelectronics Limited New Energy Vehicle Power Chip Product and Services
- Table 148. China Resources Microelectronics Limited New Energy Vehicle Power Chip Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 149. China Resources Microelectronics Limited Recent Developments/Updates
- Table 150. Global New Energy Vehicle Power Chip Sales Quantity by Manufacturer (2021-2026) & (K Units)
- Table 151. Global New Energy Vehicle Power Chip Revenue by Manufacturer (2021-2026) & (USD Million)
- Table 152. Global New Energy Vehicle Power Chip Average Price by Manufacturer (2021-2026) & (US\$/Unit)
- Table 153. Market Position of Manufacturers in New Energy Vehicle Power Chip, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025
- Table 154. Head Office and New Energy Vehicle Power Chip Production Site of Key Manufacturer
- Table 155. New Energy Vehicle Power Chip Market: Company Product Type Footprint

Table 156. New Energy Vehicle Power Chip Market: Company Product Application Footprint

Table 157. New Energy Vehicle Power Chip New Market Entrants and Barriers to Market Entry

Table 158. New Energy Vehicle Power Chip Mergers, Acquisition, Agreements, and Collaborations

Table 159. Global New Energy Vehicle Power Chip Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR

Table 160. Global New Energy Vehicle Power Chip Sales Quantity by Region (2021-2026) & (K Units)

Table 161. Global New Energy Vehicle Power Chip Sales Quantity by Region (2027-2032) & (K Units)

Table 162. Global New Energy Vehicle Power Chip Consumption Value by Region (2021-2026) & (USD Million)

Table 163. Global New Energy Vehicle Power Chip Consumption Value by Region (2027-2032) & (USD Million)

Table 164. Global New Energy Vehicle Power Chip Average Price by Region (2021-2026) & (US\$/Unit)

Table 165. Global New Energy Vehicle Power Chip Average Price by Region (2027-2032) & (US\$/Unit)

Table 166. Global New Energy Vehicle Power Chip Sales Quantity by Type (2021-2026) & (K Units)

Table 167. Global New Energy Vehicle Power Chip Sales Quantity by Type (2027-2032) & (K Units)

Table 168. Global New Energy Vehicle Power Chip Consumption Value by Type (2021-2026) & (USD Million)

Table 169. Global New Energy Vehicle Power Chip Consumption Value by Type (2027-2032) & (USD Million)

Table 170. Global New Energy Vehicle Power Chip Average Price by Type (2021-2026) & (US\$/Unit)

Table 171. Global New Energy Vehicle Power Chip Average Price by Type (2027-2032) & (US\$/Unit)

Table 172. Global New Energy Vehicle Power Chip Sales Quantity by Application (2021-2026) & (K Units)

Table 173. Global New Energy Vehicle Power Chip Sales Quantity by Application (2027-2032) & (K Units)

Table 174. Global New Energy Vehicle Power Chip Consumption Value by Application (2021-2026) & (USD Million)

Table 175. Global New Energy Vehicle Power Chip Consumption Value by Application

(2027-2032) & (USD Million)

Table 176. Global New Energy Vehicle Power Chip Average Price by Application (2021-2026) & (US\$/Unit)

Table 177. Global New Energy Vehicle Power Chip Average Price by Application (2027-2032) & (US\$/Unit)

Table 178. North America New Energy Vehicle Power Chip Sales Quantity by Type (2021-2026) & (K Units)

Table 179. North America New Energy Vehicle Power Chip Sales Quantity by Type (2027-2032) & (K Units)

Table 180. North America New Energy Vehicle Power Chip Sales Quantity by Application (2021-2026) & (K Units)

Table 181. North America New Energy Vehicle Power Chip Sales Quantity by Application (2027-2032) & (K Units)

Table 182. North America New Energy Vehicle Power Chip Sales Quantity by Country (2021-2026) & (K Units)

Table 183. North America New Energy Vehicle Power Chip Sales Quantity by Country (2027-2032) & (K Units)

Table 184. North America New Energy Vehicle Power Chip Consumption Value by Country (2021-2026) & (USD Million)

Table 185. North America New Energy Vehicle Power Chip Consumption Value by Country (2027-2032) & (USD Million)

Table 186. Europe New Energy Vehicle Power Chip Sales Quantity by Type (2021-2026) & (K Units)

Table 187. Europe New Energy Vehicle Power Chip Sales Quantity by Type (2027-2032) & (K Units)

Table 188. Europe New Energy Vehicle Power Chip Sales Quantity by Application (2021-2026) & (K Units)

Table 189. Europe New Energy Vehicle Power Chip Sales Quantity by Application (2027-2032) & (K Units)

Table 190. Europe New Energy Vehicle Power Chip Sales Quantity by Country (2021-2026) & (K Units)

Table 191. Europe New Energy Vehicle Power Chip Sales Quantity by Country (2027-2032) & (K Units)

Table 192. Europe New Energy Vehicle Power Chip Consumption Value by Country (2021-2026) & (USD Million)

Table 193. Europe New Energy Vehicle Power Chip Consumption Value by Country (2027-2032) & (USD Million)

Table 194. Asia-Pacific New Energy Vehicle Power Chip Sales Quantity by Type (2021-2026) & (K Units)

Table 195. Asia-Pacific New Energy Vehicle Power Chip Sales Quantity by Type (2027-2032) & (K Units)

Table 196. Asia-Pacific New Energy Vehicle Power Chip Sales Quantity by Application (2021-2026) & (K Units)

Table 197. Asia-Pacific New Energy Vehicle Power Chip Sales Quantity by Application (2027-2032) & (K Units)

Table 198. Asia-Pacific New Energy Vehicle Power Chip Sales Quantity by Region (2021-2026) & (K Units)

Table 199. Asia-Pacific New Energy Vehicle Power Chip Sales Quantity by Region (2027-2032) & (K Units)

Table 200. Asia-Pacific New Energy Vehicle Power Chip Consumption Value by Region (2021-2026) & (USD Million)

Table 201. Asia-Pacific New Energy Vehicle Power Chip Consumption Value by Region (2027-2032) & (USD Million)

Table 202. South America New Energy Vehicle Power Chip Sales Quantity by Type (2021-2026) & (K Units)

Table 203. South America New Energy Vehicle Power Chip Sales Quantity by Type (2027-2032) & (K Units)

Table 204. South America New Energy Vehicle Power Chip Sales Quantity by Application (2021-2026) & (K Units)

Table 205. South America New Energy Vehicle Power Chip Sales Quantity by Application (2027-2032) & (K Units)

Table 206. South America New Energy Vehicle Power Chip Sales Quantity by Country (2021-2026) & (K Units)

Table 207. South America New Energy Vehicle Power Chip Sales Quantity by Country (2027-2032) & (K Units)

Table 208. South America New Energy Vehicle Power Chip Consumption Value by Country (2021-2026) & (USD Million)

Table 209. South America New Energy Vehicle Power Chip Consumption Value by Country (2027-2032) & (USD Million)

Table 210. Middle East & Africa New Energy Vehicle Power Chip Sales Quantity by Type (2021-2026) & (K Units)

Table 211. Middle East & Africa New Energy Vehicle Power Chip Sales Quantity by Type (2027-2032) & (K Units)

Table 212. Middle East & Africa New Energy Vehicle Power Chip Sales Quantity by Application (2021-2026) & (K Units)

Table 213. Middle East & Africa New Energy Vehicle Power Chip Sales Quantity by Application (2027-2032) & (K Units)

Table 214. Middle East & Africa New Energy Vehicle Power Chip Sales Quantity by

Country (2021-2026) & (K Units)

Table 215. Middle East & Africa New Energy Vehicle Power Chip Sales Quantity by Country (2027-2032) & (K Units)

Table 216. Middle East & Africa New Energy Vehicle Power Chip Consumption Value by Country (2021-2026) & (USD Million)

Table 217. Middle East & Africa New Energy Vehicle Power Chip Consumption Value by Country (2027-2032) & (USD Million)

Table 218. New Energy Vehicle Power Chip Raw Material

Table 219. Key Manufacturers of New Energy Vehicle Power Chip Raw Materials

Table 220. New Energy Vehicle Power Chip Typical Distributors

Table 221. New Energy Vehicle Power Chip Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. New Energy Vehicle Power Chip Picture

Figure 2. Global New Energy Vehicle Power Chip Revenue by Type, (USD Million), 2021 & 2025 & 2032

Figure 3. Global New Energy Vehicle Power Chip Revenue Market Share by Type in 2025

Figure 4. SiC MOSFET Modules Examples

Figure 5. SiC MOSFET Discretes Examples

Figure 6. SiC Diode/SBD Examples

Figure 7. Global New Energy Vehicle Power Chip Revenue by Wafer Size, (USD Million), 2021 & 2025 & 2032

Figure 8. Global New Energy Vehicle Power Chip Revenue Market Share by Wafer Size in 2025

Figure 9. 4-inch SiC Power Chip Examples

Figure 10. 6-inch SiC Power Chip Examples

Figure 11. 8-inch SiC Power Chip Examples

Figure 12. Global New Energy Vehicle Power Chip Revenue by Voltage Range, (USD Million), 2021 & 2025 & 2032

Figure 13. Global New Energy Vehicle Power Chip Revenue Market Share by Voltage Range in 2025

Figure 14. Below 650V SiC Power Chip Examples

Figure 15. 650V-1200V SiC Power Chip Examples

Figure 16. Above 1200V SiC Power Chip Examples

Figure 17. Global New Energy Vehicle Power Chip Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 18. Global New Energy Vehicle Power Chip Revenue Market Share by Application in 2025

Figure 19. Motor Drive Examples

Figure 20. Battery Management Examples

Figure 21. Air Conditioning Drive Examples

Figure 22. Others Examples

Figure 23. Global New Energy Vehicle Power Chip Consumption Value, (USD Million): 2021 & 2025 & 2032

Figure 24. Global New Energy Vehicle Power Chip Consumption Value and Forecast (2021-2032) & (USD Million)

Figure 25. Global New Energy Vehicle Power Chip Sales Quantity (2021-2032) & (K

Units)

Figure 26. Global New Energy Vehicle Power Chip Price (2021-2032) & (US\$/Unit)

Figure 27. Global New Energy Vehicle Power Chip Sales Quantity Market Share by Manufacturer in 2025

Figure 28. Global New Energy Vehicle Power Chip Revenue Market Share by Manufacturer in 2025

Figure 29. Producer Shipments of New Energy Vehicle Power Chip by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 30. Top 3 New Energy Vehicle Power Chip Manufacturer (Revenue) Market Share in 2025

Figure 31. Top 6 New Energy Vehicle Power Chip Manufacturer (Revenue) Market Share in 2025

Figure 32. Global New Energy Vehicle Power Chip Sales Quantity Market Share by Region (2021-2032)

Figure 33. Global New Energy Vehicle Power Chip Consumption Value Market Share by Region (2021-2032)

Figure 34. North America New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 35. Europe New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 36. Asia-Pacific New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 37. South America New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 38. Middle East & Africa New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 39. Global New Energy Vehicle Power Chip Sales Quantity Market Share by Type (2021-2032)

Figure 40. Global New Energy Vehicle Power Chip Consumption Value Market Share by Type (2021-2032)

Figure 41. Global New Energy Vehicle Power Chip Average Price by Type (2021-2032) & (US\$/Unit)

Figure 42. Global New Energy Vehicle Power Chip Sales Quantity Market Share by Application (2021-2032)

Figure 43. Global New Energy Vehicle Power Chip Revenue Market Share by Application (2021-2032)

Figure 44. Global New Energy Vehicle Power Chip Average Price by Application (2021-2032) & (US\$/Unit)

Figure 45. North America New Energy Vehicle Power Chip Sales Quantity Market Share

by Type (2021-2032)

Figure 46. North America New Energy Vehicle Power Chip Sales Quantity Market Share by Application (2021-2032)

Figure 47. North America New Energy Vehicle Power Chip Sales Quantity Market Share by Country (2021-2032)

Figure 48. North America New Energy Vehicle Power Chip Consumption Value Market Share by Country (2021-2032)

Figure 49. United States New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 50. Canada New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 51. Mexico New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 52. Europe New Energy Vehicle Power Chip Sales Quantity Market Share by Type (2021-2032)

Figure 53. Europe New Energy Vehicle Power Chip Sales Quantity Market Share by Application (2021-2032)

Figure 54. Europe New Energy Vehicle Power Chip Sales Quantity Market Share by Country (2021-2032)

Figure 55. Europe New Energy Vehicle Power Chip Consumption Value Market Share by Country (2021-2032)

Figure 56. Germany New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 57. France New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 58. United Kingdom New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 59. Russia New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 60. Italy New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 61. Asia-Pacific New Energy Vehicle Power Chip Sales Quantity Market Share by Type (2021-2032)

Figure 62. Asia-Pacific New Energy Vehicle Power Chip Sales Quantity Market Share by Application (2021-2032)

Figure 63. Asia-Pacific New Energy Vehicle Power Chip Sales Quantity Market Share by Region (2021-2032)

Figure 64. Asia-Pacific New Energy Vehicle Power Chip Consumption Value Market Share by Region (2021-2032)

Figure 65. China New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 66. Japan New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 67. South Korea New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 68. India New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 69. Southeast Asia New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 70. Australia New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 71. South America New Energy Vehicle Power Chip Sales Quantity Market Share by Type (2021-2032)

Figure 72. South America New Energy Vehicle Power Chip Sales Quantity Market Share by Application (2021-2032)

Figure 73. South America New Energy Vehicle Power Chip Sales Quantity Market Share by Country (2021-2032)

Figure 74. South America New Energy Vehicle Power Chip Consumption Value Market Share by Country (2021-2032)

Figure 75. Brazil New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 76. Argentina New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 77. Middle East & Africa New Energy Vehicle Power Chip Sales Quantity Market Share by Type (2021-2032)

Figure 78. Middle East & Africa New Energy Vehicle Power Chip Sales Quantity Market Share by Application (2021-2032)

Figure 79. Middle East & Africa New Energy Vehicle Power Chip Sales Quantity Market Share by Country (2021-2032)

Figure 80. Middle East & Africa New Energy Vehicle Power Chip Consumption Value Market Share by Country (2021-2032)

Figure 81. Turkey New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 82. Egypt New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 83. Saudi Arabia New Energy Vehicle Power Chip Consumption Value (2021-2032) & (USD Million)

Figure 84. South Africa New Energy Vehicle Power Chip Consumption Value

(2021-2032) & (USD Million)

Figure 85. New Energy Vehicle Power Chip Market Drivers

Figure 86. New Energy Vehicle Power Chip Market Restraints

Figure 87. New Energy Vehicle Power Chip Market Trends

Figure 88. Porters Five Forces Analysis

Figure 89. Manufacturing Cost Structure Analysis of New Energy Vehicle Power Chip in 2025

Figure 90. Manufacturing Process Analysis of New Energy Vehicle Power Chip

Figure 91. New Energy Vehicle Power Chip Industrial Chain

Figure 92. Sales Channel: Direct to End-User vs Distributors

Figure 93. Direct Channel Pros & Cons

Figure 94. Indirect Channel Pros & Cons

Figure 95. Methodology

Figure 96. Research Process and Data Source

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