

Global Power Integrated Modules Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Power Integrated Modules market size is expected to reach \$ 1057 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

Power Integrated Modules (PIMs) are highly integrated power semiconductor modules that combine several main power conversion circuits in one insulated package. Under the narrow market scope used in this study, PIMs primarily refer to Converter-Inverter-Brake modules integrating a three-phase rectifier bridge, brake chopper stage, three-phase inverter bridge and auxiliary sensing elements. Typical technologies include silicon IGBT plus FRD, Si/SiC hybrid configurations and emerging SiC MOSFET-based integrated modules. Typical voltage classes are 600V/650V, 1200V and selected 1700V ratings. Major applications include industrial inverters, servo drives, HVAC systems, UPS, white goods, commercial air conditioners, solar inverters and energy storage inverters.

PIMs should not be treated as a broad synonym for all power modules. The narrow and more defensible industry scope is Converter-Inverter-Brake PIMs, which integrate the rectifier bridge, brake chopper and three-phase inverter stage in one module package. This architecture is particularly valuable in industrial inverters, servo drives, HVAC systems, UPS, solar inverters and energy storage inverters, where compact main-circuit design, simplified assembly and improved system-level reliability are critical. The technology is mature, but product-level innovation continues through better thermal cycling performance, PressFIT terminals, transfer-molded packaging, Si/SiC hybrid configurations and higher-density module layouts.

From the supply side, the market is led by established European, Japanese and U.S.

power semiconductor companies, while China-based suppliers are expanding quickly in industrial and appliance-oriented modules. Infineon, Fuji Electric, Mitsubishi Electric/Vincotech, onsemi, STMicroelectronics and Littelfuse/IXYS have the strongest public evidence in standardized PIM/CIB product lines. BYD Semiconductor, Silan Microelectronics, China Resources Microelectronics and WeEn Semiconductors have clear China-based product evidence, while several other Chinese IGBT module vendors remain in the extended or watchlist layer because their PIM-specific public evidence is less complete. This explains why the broad supplier pool is materially larger than the core formal list.

Demand growth is mainly driven by industrial automation, energy-saving motor drives, HVAC electrification, UPS, solar inverters, energy storage systems and regional supply-chain localization. Policy support for semiconductor resilience, clean energy, EV adoption and industrial energy efficiency indirectly benefits PIM suppliers, although the product itself remains a mature power-electronics building block. The main substitution risks are visible at both ends of the market: low-power applications may migrate toward IPMs with integrated drivers, while high-power and automotive traction applications increasingly adopt customized SiC modules or integrated power units. As a result, the most attractive PIM segment remains mid-power, cost-sensitive, reliability-driven industrial and renewable-energy conversion equipment.

This report studies the global Power Integrated Modules production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

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

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

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

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

U.S. VS China: Power Integrated Modules domestic production, consumption, key domestic manufacturers and share

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

Global Power Integrated Modules production by Semiconductor Device Technology, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

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

This report profiles key players in the global Power Integrated Modules 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 (Vincotech), onsemi, BYD Semiconductor, Fuji Electric, Infineon Technologies AG, STMicroelectronics, Littelfuse, Hangzhou Silan Microelectronics, China Resources Microelectronics Limited, WeEn Semiconductors, 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 Power Integrated Modules 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 Semiconductor Device Technology, 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 Power Integrated Modules Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Power Integrated Modules Market, Segmentation by Semiconductor Device Technology:

Si IGBT + FRD PIM

Si IGBT + SiC Diode Hybrid PIM

SiC MOSFET PIM

MOSFET-based PIM

Other

Global Power Integrated Modules Market, Segmentation by Circuit Topology:

CIB / CBI PIM

Other

Global Power Integrated Modules Market, Segmentation by Voltage Class:

600V / 650V

750V

1200V

1700V

Other

Global Power Integrated Modules Market, Segmentation by Application:

Industrial Inverters

Servo Drives

HVAC and Commercial Air Conditioning

UPS

Solar and Energy Storage Inverters

White Goods

Other

Companies Profiled:

Mitsubishi Electric (Vincotech)

onsemi

BYD Semiconductor

Fuji Electric

Infineon Technologies AG

STMicroelectronics

Littelfuse

Hangzhou Silan Microelectronics

China Resources Microelectronics Limited

WeEn Semiconductors

Powerex, Inc.

Micro Commercial Components Corp.

Qinxin Microelectronics

Shenzhen Invsemi Technology

StarPower Semiconductor

Jiangsu MacMic Science & Technology Co., Ltd.

Yangzhou Yangjie Electronic Technology Co., Ltd.

Wuxi NCE Power Co., Ltd.

Microchip Technology Inc.

Key Questions Answered:

1. How big is the global Power Integrated Modules market?
2. What is the demand of the global Power Integrated Modules market?
3. What is the year over year growth of the global Power Integrated Modules market?
4. What is the production and production value of the global Power Integrated Modules market?
5. Who are the key producers in the global Power Integrated Modules market?
6. What are the growth factors driving the market demand?

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