

Global Power Module Packaging Materials Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Power Module Packaging Materials market size is expected to reach \$ 6111 million by 2032, rising at a market growth of 8.3% CAGR during the forecast period (2026-2032).

Power semiconductor module packaging materials refer to the critical structural, thermal, electrical and bonding materials used in the packaging and assembly of power semiconductor modules based on IGBT, SiC MOSFET, Si MOSFET, FRD, GaN and other power devices. The scope focuses on materials used inside the module package and at the module-to-cooling interface, covering ceramic substrates, baseplates, substrate attach materials, die attach materials, encapsulation materials, electrical interconnection materials, module cases and thermal interface materials. These materials provide chip support, electrical insulation, thermal conduction, mechanical stability, die bonding, environmental protection, electrical interconnection and heat dissipation. Key technology routes include DBC, AMB, DAB, DBA, DPC, silver and copper sintering, solder attach, silicone gel encapsulation, epoxy molding compounds, aluminum/copper wire and ribbon bonding, clip or top-side interconnection, AlSiC/Cu/Cu-Mo baseplates and high-performance TIMs. Major applications include electric vehicles, PV inverters, wind converters, battery energy storage systems, industrial motor drives, UPS, rail traction, HVDC and EV DC chargers.

Power semiconductor module packaging materials should be understood as a multi-material system rather than a single product category. Ceramic substrates provide electrical insulation, heat conduction and chip support; baseplates provide mechanical strength and heat spreading; die attach and substrate attach materials determine thermal resistance and long-term reliability; encapsulation materials provide insulation, moisture protection and stress relief; and electrical interconnection materials affect

current-carrying capability, parasitic inductance and power cycling lifetime. As SiC modules move from premium electric vehicles and high-end industrial applications into broader EV, charging, PV, storage and motor-drive markets, the purchasing criteria for packaging materials are shifting from cost and process compatibility toward thermal-cycle reliability, high-temperature stability, low stress, low thermal resistance, low partial-discharge risk and stable automotive-grade supply.

The global market is characterized by a strong Japanese and Western material base, combined with rapid capacity expansion in China. Japanese suppliers have deep capabilities in Si₃N₄ AMB substrates, AlN substrates, epoxy molding compounds, silver sintering and precision metal materials. European and North American suppliers remain strong in ceramic substrates, silicone gels, sintering materials, thermal interface materials, interconnects and high-reliability baseplates. Chinese companies are expanding rapidly in DBC/AMB ceramic substrates and EV power module cooling substrates, with selected players moving from domestic substitution into broader customer qualification. Because qualification cycles for automotive and industrial power modules are long and reliability data are critical, competitive shifts will be gradual rather than abrupt.

Electric vehicles represent the most important incremental driver, especially main inverter, OBC, DC/DC and high-voltage auxiliary power systems. PV, wind and battery energy storage systems provide additional volume growth through inverters, PCS and power conversion systems. Rail traction, HVDC and industrial drives are more mature, but they require high-voltage, high-current and long-lifetime modules, supporting demand for higher-end substrates, baseplates and encapsulation systems. Future market growth will not be driven only by module shipment volume. A meaningful part of the value expansion will come from SiC penetration, 800V architectures, double-side cooling, baseplate-less designs, transfer-molded packages and higher power density module structures.

This report studies the global Power Module Packaging Materials demand, key companies, and key regions.

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

Highlights and key features of the study

Global Power Module Packaging Materials total market, 2021-2032, (USD Million)

Global Power Module Packaging Materials total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Power Module Packaging Materials total market, key domestic companies, and share, (USD Million)

Global Power Module Packaging Materials revenue by player, revenue and market share 2021-2026, (USD Million)

Global Power Module Packaging Materials total market by Product Function, CAGR, 2021-2032, (USD Million)

Global Power Module Packaging Materials total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Power Module Packaging Materials market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include AMETEK EIP, Heraeus Electronics, TANAKA Precious Metals, Dow, MacDermid Alpha, Avantor (NuSil), Wacker Chemie AG, CHT Germany GmbH, Elkem Silicones, Shin-Etsu Chemical, 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 Module Packaging Materials market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Product Function, 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 Module Packaging Materials Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Power Module Packaging Materials Market, Segmentation by Product Function:

Ceramic Substrate

Baseplate

Die Attach

Substrate Attach

Encapsulation

Electrical Interconnection

Case

Thermal Interface Material

Global Power Module Packaging Materials Market, Segmentation by Power Device Platform:

Si IGBT Module

SiC MOSFET Module

Si MOSFET Module

GaN Power Module

Other

Global Power Module Packaging Materials Market, Segmentation by Application:

EV

EV DC Chargers

PV

Wind

BESS

Industrial Motors

UPS

Rail

HVDC

Home Appliances

Companies Profiled:

AMETEK EIP

Heraeus Electronics

TANAKA Precious Metals

Dow

MacDermid Alpha

Avantor (NuSil)

Wacker Chemie AG

CHT Germany GmbH

Elkem Silicones

Shin-Etsu Chemical

KCC (Momentive)

Resonac

Sumitomo Bakelite

Kyocera

Chang Chun Group

Qnity Electronics

Indium Corporation

Henkel

TAMURA CORPORATION

Shenzhen Jufeng Solder

NAMICS

Mitsui Kinzoku

Rogers Corporation

NGK Corporation

Niterra Materials

Denka

Proterial

Mitsubishi Materials

Ferrotec/Fulehua

BYD

Bomin Electronics

Zhejiang TC Ceramic Electronic

Shengda Tech

Nanjing Zhongjiang New Material Science & Technology

Huangshan Googe

Jiangyin Saiying electron

Kunshan Gootage Thermal Technology

Jentech Precision Industrial

Plansee

A.L.M.T.corp

Amulair Thermal Technology

Dana Incorporated

TAIWA CO., Ltd.

CPS Technologies

Kawaso Texcel

Malico Inc

Jem Industries Corp.

Haite Xinke New Materials Technology

Zhuhai Fuji Intelligent

Key Questions Answered

1. How big is the global Power Module Packaging Materials market?
2. What is the demand of the global Power Module Packaging Materials market?
3. What is the year over year growth of the global Power Module Packaging Materials market?
4. What is the total value of the global Power Module Packaging Materials market?
5. Who are the Major Players in the global Power Module Packaging Materials market?
6. What are the growth factors driving the market demand?

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