

Global Press-pack IGBT Modules Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Press-pack IGBT Modules market size is expected to reach \$ 282 million by 2032, rising at a market growth of 12.4% CAGR during the forecast period (2026-2032). Press-pack IGBT modules are pressure-contact power semiconductor packages where the main current path relies on external clamping force (pressure contacts) rather than conventional wire bonds / large-area solder joints typically used in plastic isolated-base modules. The structure is commonly implemented in a ceramic/metal hermetic enclosure, enabling strong environmental robustness, double-sided cooling, and straightforward stacking + series connection for valve/stack architectures. In practice, major product types include: (1) Press-pack IGBTs with or without an internal freewheeling diode (FWD); (2) press-pack diode modules used alongside IGBTs to form converter legs; and (3) grid-converter-oriented reverse-conducting press-pack devices (e.g., solutions referenced for HVDC Light applications).

The technology is strongly anchored in high-voltage, high-power, high-availability systems?most notably medium-voltage (MV) drives and VSC-HVDC. As MMC-based VSC-HVDC platforms scale (especially for offshore links), system designers increasingly value press-pack attributes such as low parasitic inductance in stacked layouts, double-sided cooling capability, and system-friendly failure behavior. Hitachi Energy publicly states that its HVDC Light solutions are based on IGBT/BiGT press-pack technology, and points to offshore wind transmission use cases such as Dogger Bank, illustrating where press-pack device stacks are deployed in modern grid infrastructure.

Trends largely follow ?higher power density + higher lifetime assurance?: stronger emphasis on short-circuit failure mode / fail-to-short behavior to support redundancy and availability in HVDC/FACTS stacks, continued improvements in pressure uniformity and long-term contact stability, and tighter thermal integration (double-sided cooling paths, stack-level thermal management), with offshore operation pushing

humidity/robustness requirements. Demand drivers include renewable integration and long-distance transmission (HVDC buildout, offshore wind export), grid stability investments (FACTS), and industrial electrification that pulls MV drives toward higher performance and uptime. The competitive landscape remains concentrated among suppliers with both high-voltage die capability and press-pack packaging know-how?e.g., Hitachi Energy (StakPak), Infineon (PressPACK IGBT), Toshiba (Press-Pack IEGT family), Dynex, alongside emerging supply-chain participation in China. The value chain typically runs from upstream silicon power device manufacturing plus ceramic/metal housing & electrode materials ? midstream press-pack assembly, hermetic packaging and screening ? downstream stack/valve and converter OEM integration and field operation (HVDC, STATCOM/FACTS, MV drives).

This report studies the global Press-pack IGBT Modules production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Press-pack IGBT Modules total production and demand, 2021-2032, (K Units)

Global Press-pack IGBT Modules total production value, 2021-2032, (USD Million)

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

Global Press-pack IGBT Modules consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Press-pack IGBT Modules domestic production, consumption, key domestic manufacturers and share

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

Global Press-pack IGBT Modules production by VCES (Max), production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Press-pack IGBT Modules production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Press-pack IGBT 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 Littelfuse (IXYS), Zhuzhou CRRC Times Electric, Hitachi Energy, Toshiba, Nari Technology, Infineon, Poseico S.p.A., 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 Press-pack IGBT 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 VCES (Max), 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 Press-pack IGBT Modules Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Press-pack IGBT Modules Market, Segmentation by VCES (Max):

4.5KV

Others

Global Press-pack IGBT Modules Market, Segmentation by Diode Integration:

IGBT without internal FWD

IGBT with internal FWD

Reverse-conducting Route (RC-IGBT)

Global Press-pack IGBT Modules Market, Segmentation by Application:

HVDC & FACTS Power Grid

Industrial Drive, Frequency Converter

Locomotive/ Rail Transport

Companies Profiled:

Littelfuse (IXYS)

Zhuzhou CRRC Times Electric

Hitachi Energy

Toshiba

Nari Technology

Infineon

Poseico S.p.A.

Key Questions Answered:

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

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