

Global Press Pack IGBTs Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Press Pack IGBTs market size is expected to reach \$ 324 million by 2032, rising at a market growth of 14.3% CAGR during the forecast period (2026-2032).

Press-pack IGBTs are an alternative to isolated-base plastic modules. Instead of the wire bonds and solder joints used in isolated-base modules, press-packs rely on the application of force by an external clamping system, to make contact to the chips. This report studies the press pack IGBTs (PPI), 4500V, 6500V, 3300V, 1700V, etc.

Press-Pack IGBTs are high-power insulated-gate bipolar transistor devices in which the semiconductor chips, electrodes and internal conductors establish their principal electrical and thermal contacts through externally applied mechanical pressure. Unlike conventional insulated IGBT modules that commonly use bond wires, solder joints and an electrically insulated baseplate, press-pack devices are clamped directly between cooling plates and normally support double-sided cooling, low package inductance, high power-cycling capability and controlled short-circuit failure behaviour. These characteristics make them particularly suitable for high-current converters containing large numbers of semiconductor devices connected in series. The market scope includes conventional Press-Pack IGBTs, Toshiba's Press-Pack IEGTs and Hitachi Energy's press-pack BiGT/StakPak devices, because these products use closely related insulated-gate bipolar semiconductor technologies and target the same high-power converter applications. The mainstream commercial voltage class is 4.5 kV, typically covering rated currents of approximately 1.5-3.0 kA or higher, while non-4.5 kV products include 6.5 kV devices, Hitachi Energy's 5.2 kV reverse-conducting BiGT products, and smaller 3.3 kV, 2.5 kV and selected lower-voltage products. Infineon currently positions 4.5 kV Press-Pack IGBTs for HVDC, FACTS, traction, wind power and medium-voltage drives, while Toshiba has expanded the commercial market toward

6.5 kV/2.0 kA Press-Pack IEGTs for DC transmission, STATCOM and industrial motor drives.

Press-Pack IGBTs are generally procured in concentrated batches for individual HVDC converter valves, offshore transmission systems, STATCOM installations and large industrial converters, and device deliveries may occur well before project commissioning. Consequently, annual market results are strongly influenced by the timing of customer qualification, converter-valve production, project acceptance and spare-device procurement. After the 2022 trough, revenue recovered by 49.2% in 2023, 26.6% in 2024 and 19.6% in 2025, indicating that the industry has entered a new expansion cycle. Growth is expected to remain above 19% during 2026-2028 before moderating as the market becomes larger. The sector nevertheless remains relatively small in unit terms because each device carries a high value and serves specialized infrastructure rather than general-purpose power-electronics applications.

HVDC & FACTS represents the overwhelmingly dominant application, accounting for an estimated 92.59% of global Press-Pack IGBT revenue in 2025 and rising to 94.94% by 2032. The segment includes VSC-HVDC and MMC converter valves, offshore-wind transmission, cross-border interconnectors, city-centre infeeds, back-to-back frequency conversion, STATCOM and selected high-voltage DC circuit breakers. Hitachi Energy confirms that its HVDC Light platform uses IGBT/BiGT press-pack StakPak modules, including a 5.2 kV/2.0 kA reverse-conducting device developed for the Dogger Bank offshore-wind transmission system. Infineon similarly identifies IGBT press packs as a core device platform for high-power VSC-HVDC systems based on MMC topologies, while Toshiba highlights HVDC, active reactive-power compensation and medium-voltage inverters as principal Press-Pack IEGT applications. Industrial and medium-voltage drives account for a much smaller share, declining from 4.07% in 2025 to 2.73% in 2032 despite continued absolute growth. Relevant systems include mining hoists, compressors, pumps, rolling mills, marine propulsion and other multi-megawatt drives. Traction, electric vehicles and other applications decline from 3.34% to 2.33% of revenue; within this category, rail traction, railway power conversion, replacement devices and specialized heavy-duty systems are substantially more important than mainstream passenger electric vehicles, which predominantly use automotive-qualified isolated IGBT or SiC modules.

China is the largest demand market, accounting for an estimated 62.58% of global revenue in 2025 and approximately 63.41% in 2032. Its dominant position reflects large-scale flexible-HVDC investment, offshore-wind transmission, domestic converter-valve manufacturing and the localization of high-voltage power semiconductors. Europe is the

second-largest market, with a projected share of 15.26% in 2032, supported by North Sea offshore-wind connections, German transmission corridors, UK offshore projects and cross-border interconnectors. North America is expected to maintain a share of approximately 9%, while Japan, South Korea, India and Southeast Asia remain smaller, project-specific markets. The competitive landscape is highly concentrated but undergoing structural change. Zhuzhou CRRC Times Semiconductor became the estimated market leader in 2025 with a 27.39% revenue share, followed by Littelfuse at 22.64%, Hitachi Energy at 19.22% and Toshiba at 11.94%. NARI Technology and Infineon increased their estimated shares to 8.77% and 8.18%, respectively, indicating the simultaneous rise of Chinese domestic substitution and a new major European entrant. The combined share of CRRC Times Semiconductor, NARI Technology and Beijing Xinchuang Chunshu Rectifier reached approximately 36.65% in 2025, while the Other category declined to only 0.45%. This concentration reflects demanding reliability qualification, proprietary package technology, long customer approval cycles and the close integration required between semiconductor suppliers and converter-valve manufacturers.

The principal industry trend is the increasing concentration of demand in high-voltage grid infrastructure, particularly offshore-wind HVDC, long-distance VSC transmission, STATCOM and other flexible-grid systems. The IEA expects global electricity consumption to continue expanding as industry, air conditioning, electric vehicles, heat pumps, artificial intelligence and other electricity-intensive technologies increase load, requiring substantial strengthening and expansion of transmission networks. Product development is moving toward higher blocking voltages, higher current ratings, reverse-conducting chip structures, lower losses and more compact converter valves. The 4.5 kV platform will remain the principal commercial standard, but 5.2 kV and 6.5 kV products are expected to gain share where reducing the number of series-connected devices, gate drivers and cooling positions provides significant system-level value. At the same time, Chinese suppliers will continue moving from engineering validation toward project-scale deployment, increasing pricing competition and second-source availability. The industry will remain subject to substantial annual volatility because HVDC projects require long development cycles and depend on the availability of cables, transformers and other grid equipment; the IEA reports that prices and procurement times for key transmission components have increased materially, potentially shifting semiconductor deliveries between forecast years. Overall, market growth will be driven by grid modernization, renewable-energy integration, offshore wind, higher transmission voltages, demand for compact and fault-tolerant converter systems, and the increasing strategic importance of secure high-power semiconductor supply chains.

This report studies the global Press Pack IGBTs production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Press Pack IGBTs total production and demand, 2021-2032, (Units)
Global Press Pack IGBTs total production value, 2021-2032, (USD Million)
Global Press Pack IGBTs production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)
Global Press Pack IGBTs consumption by region & country, CAGR, 2021-2032 & (Units)
U.S. VS China: Press Pack IGBTs domestic production, consumption, key domestic manufacturers and share
Global Press Pack IGBTs production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)
Global Press Pack IGBTs production by VCES (Max), production, value, CAGR, 2021-2032, (USD Million) & (Units)
Global Press Pack IGBTs production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Press Pack IGBTs 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), Hitachi Energy, Toshiba, Zhuzhou CRRC Times Semiconductor, Infineon, Poseico S.p.A., Nari Technology, Beijing Xinchuang Chunshu Rectifier, 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 IGBTs market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (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 IGBTs Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Press Pack IGBTs Market, Segmentation by VCES (Max):

4.5kV Press-pack IGBTs

Others

Global Press Pack IGBTs Market, Segmentation by Application:

HVDC & FACTS

Industrial & Medium Voltage Drives

Traction & Electric Vehicles and Others

Companies Profiled:

Littelfuse (IXYS)

Hitachi Energy

Toshiba

Zhuzhou CRRC Times Semiconductor

Infineon

Poseico S.p.A.

Nari Technology

Beijing Xinchuang Chunshu Rectifier

Key Questions Answered:

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

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