

Global SiC Power Chip Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global SiC Power Chip market size is expected to reach \$ 21771 million by 2032, rising at a market growth of 19.6% CAGR during the forecast period (2026-2032).

Silicon Carbide Power Chips are core power semiconductor devices manufactured on the basis of silicon carbide, a third-generation wide-bandgap semiconductor material, and are designed to perform efficient and reliable power conversion and control under high-voltage, high-temperature, high-frequency, and high-power-density operating conditions. Benefiting from the superior material properties of SiC, including high breakdown electric field, high thermal conductivity, high electron saturation drift velocity, and wide bandgap, these chips significantly reduce conduction loss and switching loss compared with conventional silicon-based devices, while also lowering cooling requirements and enabling more compact system designs. They are widely used to address efficiency, thermal management, size, and reliability challenges in electric vehicle drivetrains, onboard chargers, photovoltaic inverters, energy storage converters, industrial power supplies, and data center power systems. Typical product forms include discrete SiC MOSFET chips, SiC Schottky diode chips, and SiC bare dies for power modules. The technology originated from the long-term development of wide-bandgap semiconductor materials and advanced power electronics, with early applications mainly concentrated in high-end industrial, railway, and defense-related fields. As SiC substrate production, epitaxial growth, wafer fabrication, device design, and advanced packaging technologies have continued to improve, SiC power chips have rapidly expanded into commercial applications such as electric vehicles, renewable energy systems, and high-end industrial control. Upstream supply mainly involves key materials including SiC substrates, epitaxial wafers, photoresists, masks, sputtering targets, electronic gases, and wet chemicals, as well as semiconductor equipment and process steps such as lithography, etching, ion implantation, thin-film deposition, inspection,

dicing, and testing, together with supporting packaging materials and components such as DBC substrates, ceramic materials, bonding wires, leadframes, thermal management materials, and encapsulation compounds. In 2025, the global production capacity of silicon carbide power chips is estimated at approximately 600 million units, with sales volume reaching about 477 million units. The average selling price is around USD 12.6 per unit, and the gross profit margin of manufacturers is estimated to range from 30% to 40%.

The silicon carbide power chip market has moved beyond the early technology adoption stage and is now entering a phase of deeper application penetration. Electric vehicles remain the strongest demand driver, especially in traction inverters, onboard chargers, and DC/DC converters, where automakers and Tier 1 suppliers continue to prioritize higher efficiency, greater power density, and reduced system weight. At the same time, adoption is expanding across photovoltaic inverters, energy storage converters, industrial power supplies, and charging infrastructure, showing that the market is evolving from a mainly automotive story into a broader multi-application power electronics upgrade cycle. Recent moves by leading suppliers also show that competition is no longer limited to device performance alone, but increasingly includes supply security, packaging capability, automotive qualification, and system-level design support.

Looking ahead, the market is likely to develop along several clear lines. One is the continued shift toward higher-voltage platforms, faster switching, and higher integration to meet the needs of EV drivetrains, fast charging, storage systems, and advanced industrial equipment. Another is the move from discrete devices toward more modular, platform-based, and system-oriented solutions, making packaging, thermal design, and reliability engineering even more important. A third trend is the ongoing push toward larger wafer formats, vertically integrated manufacturing, and more localized supply chains to improve cost competitiveness, product consistency, and strategic resilience. Official announcements from major players show sustained investment in 200mm SiC manufacturing, end-to-end IDM models, advanced packaging, and long-term platform development, indicating that the long-term direction remains intact even as execution discipline becomes more critical.

Even so, the market still faces meaningful constraints. Upstream substrate availability, epitaxy quality, manufacturing yield, and device consistency continue to shape both cost and delivery capability, and broader adoption still depends on further improvements in defect control, process maturity, and packaging reliability. In addition, as earlier expansion plans move into the production phase, some suppliers are facing pressure

from heavy capital intensity, price competition, and inventory adjustments, which may create a mismatch between industry capacity buildup and the pace of end-market demand. Moreover, in some cost-sensitive or lower-power applications, silicon IGBTs, super-junction MOSFETs, and GaN devices remain viable alternatives, meaning SiC will not displace incumbent technologies at the same speed across all segments. Overall, the main growth drivers remain electrification, efficiency upgrading, and higher-voltage architectures, but wider market penetration will still depend on continued cost reduction, stronger supply-chain execution, and broader proof of system-level economic value.

This report studies the global SiC Power Chip production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global SiC Power Chip total production and demand, 2021-2032, (K Units)

Global SiC Power Chip total production value, 2021-2032, (USD Million)

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

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

U.S. VS China: SiC Power Chip domestic production, consumption, key domestic manufacturers and share

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

Global SiC Power Chip production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

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

This report profiles key players in the global SiC Power Chip 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World SiC Power Chip 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 Type, 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 SiC Power Chip Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global SiC Power Chip Market, Segmentation by Type:

SiC MOSFET Modules

SiC MOSFET Discretes

SiC Diode/SBD

Global SiC Power Chip Market, Segmentation by Wafer Size:

4-inch SiC Power Chip

6-inch SiC Power Chip

8-inch SiC Power Chip

Global SiC Power Chip Market, Segmentation by Voltage Range:

Below 650V SiC Power Chip

650V-1200V SiC Power Chip

Above 1200V SiC Power Chip

Global SiC Power Chip Market, Segmentation by Application:

Automotive & EV/HEV

EV Charging

PV, Energy Storage, Wind Power

UPS, Data Center & Server

Rail Transport

Others

Companies Profiled:

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

Key Questions Answered:

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

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