

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

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Abstracts

The global SiC Power Device Foundry market size is expected to reach \$ 2090 million by 2032, rising at a market growth of 18.0% CAGR during the forecast period (2026-2032).

SiC Power Device Wafer Foundry Services refer to specialized front-end wafer manufacturing services for silicon carbide power devices provided to external customers, including process platform development, prototyping, engineering lots, volume wafer processing, subcontracted process modules and wafer-level delivery. The service scope typically covers SiC Schottky/JBS/MPS diodes, SiC MOSFETs, SiC JFETs, SiC PiN diodes and other high-voltage power devices. Core manufacturing capabilities include SiC epitaxy interface control, ion implantation, high-temperature annealing, gate oxide formation, planar or trench device processing, ohmic contact, edge termination, metallization, passivation and wafer-level testing. Compared with silicon-based power device foundry services, SiC wafer foundry requires tighter control of material defects, gate oxide reliability, thermal budget, automotive-grade qualification and long customer validation cycles. The market therefore remains structurally smaller and more concentrated than mainstream silicon foundry markets, with a clear distinction between merchant/open foundries and captive IDM manufacturing lines.

SiC Power Device Wafer Foundry Services should be treated as a narrow and specialized manufacturing-service market rather than a broad SiC power semiconductor market. The core business is to provide external customers with SiC device wafer processing, process platform access, engineering lots, pilot production and volume manufacturing support. The supply structure is very different from silicon CMOS foundry. In SiC power devices, vertically integrated IDMs still dominate the highest-volume automotive and industrial supply chains, while the number of merchant or open

SiC foundries remains limited. X-FAB, Clas-SiC, Episil, Sanan IC, United Nova Technology and Global Power Technology represent the most relevant core foundry or foundry-like service providers under a narrow definition. Coherent, DB HiTek and SK keyfoundry/SK powertech are important adjacent or emerging players, but their exact contribution to 2025 merchant foundry revenue should be treated conservatively.

From a regional perspective, Europe and North America have strong technology positions and several leading SiC IDMs, but the open foundry pool is relatively small. China has become the most active region for new SiC manufacturing capacity, supported by vertically integrated platforms, local automotive demand, power electronics localization and regional capital expenditure. However, many Chinese players combine device design, wafer fabrication, module manufacturing and system-level customers, so their revenues should not be fully classified as merchant foundry income. Taiwan has a meaningful compound semiconductor foundry base through Episil and potential cooperation with VIS, while South Korea is emerging as a new entrant region through SK keyfoundry/SK powertech and DB HiTek. Japan remains strong in SiC devices and modules through established IDMs, but does not currently show the same level of merchant SiC foundry openness.

Demand growth is supported by electric vehicles, solar inverters, energy storage, charging infrastructure, industrial drives, rail traction and high-efficiency power supplies for data centers. Automotive applications are strategically important, but they also require long qualification cycles, tight reliability control and stable long-term supply. As a result, the foundry revenue ramp may lag behind the broader SiC device demand curve. The transition from 150mm to 200mm wafers will be a key driver of cost reduction and capacity expansion, but it also introduces yield, equipment, metrology and process-integration challenges.

This report studies the global SiC Power Device Foundry demand, key companies, and key regions.

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

Highlights and key features of the study

Global SiC Power Device Foundry total market, 2021-2032, (USD Million)

Global SiC Power Device Foundry total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: SiC Power Device Foundry total market, key domestic companies, and share, (USD Million)

Global SiC Power Device Foundry revenue by player, revenue and market share 2021-2026, (USD Million)

Global SiC Power Device Foundry total market by Device Type, CAGR, 2021-2032, (USD Million)

Global SiC Power Device Foundry total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global SiC Power Device Foundry 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 X-FAB, United Nova Technology, Episil Technologies, Hua Hong Grace Semiconductor Limited, GTA Semiconductor Co., Ltd., Shenzhen Fangzheng Microelectronics, Beijing Yandong Microelectronics, Global Power Technology, Silan Microelectronics, Wuhu Tus-Semiconductor, 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 Device Foundry market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Device 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 Device Foundry Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global SiC Power Device Foundry Market, Segmentation by Device Type:

SiC MOSFET

SiC MOSFET Module

SiC Schottky/JBS/MPS Diode

SiC Bare Die/Wafer Service

SiC JFET/BJT

Other SiC Power Devices

Global SiC Power Device Foundry Market, Segmentation by Foundry Service Model:

Open/Merchant Foundry

Captive IDM Manufacturing

Global SiC Power Device Foundry Market, Segmentation by Voltage Class:

650?750 V

900?1200 V

1700 V

Other

Global SiC Power Device Foundry Market, Segmentation by Application:

Automotive Traction Inverter

OBC/DC-DC Converter

Solar/Energy Storage Inverter

Charging Infrastructure

Industrial Power Supply/Drive

Data Center/AI Server Power

Rail/Grid/Aerospace

Other

Companies Profiled:

X-FAB

United Nova Technology

Episil Technologies

Hua Hong Grace Semiconductor Limited

GTA Semiconductor Co., Ltd.

Shenzhen Fangzheng Microelectronics

Beijing Yandong Microelectronics

Global Power Technology

Silan Microelectronics

Wuhu Tus-Semiconductor

AscenPower

BASiC Semiconductor

DB HiTek

SK keyfoundry Inc.

Sanan IC

Clas-SiC Wafer Fab

China Resources Microelectronics

STMicroelectronics

Infineon

Wolfspeed

onsemi

ROHM

Mitsubishi Electric

Bosch Semiconductors

Zhuzhou CRRC Times Semiconductor

Key Questions Answered

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

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