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Global SiC Wafer Burn-In Test System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global SiC Wafer Burn-In Test System market size is expected to reach $ 2279 million by 2032, rising at a market growth of 34.4% CAGR during the forecast period (2026-2032).

In 2025, global SiC Wafer Burn-In Test System production reached approximately 1,022 units with average price of 298,000 USD/Unit.

SiC Wafer Burn-In Test System refers to semiconductor reliability equipment that applies controlled high-temperature electrical stress to complete silicon carbide power-device wafers before wafer dicing and packaging. The system establishes simultaneous electrical contact with multiple dies through a full-wafer contactor or probe-card structure and performs stress modes such as High-Temperature Gate Bias, High-Temperature Reverse Bias, combined HTGB and HTRB, and functional or dynamic burn-in. Core functions generally include high-voltage bias generation, independent channel protection, per-die leakage-current monitoring, threshold-voltage measurement, thermal-chuck control, wafer alignment, automatic loading and unloading, failure identification and wafer-map generation. SiC Wafer Burn-In Test System is primarily used to identify early-life defects, generate Known-Good-Die data and improve the reliability of SiC power devices supplied to automotive, industrial, energy and power, data center and communication, rail transit, aerospace and defense, consumer electronics and home-appliance applications.

Key Findings

Automotive-grade SiC power devices form the most developed commercial demand base for SiC Wafer Burn-In Test System

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HTGB and HTRB are the core stress modes and are increasingly integrated within one automated test flow

Six-inch and eight-inch wafer compatibility is the principal specification of current production-oriented systems

Multi-wafer parallelism and automated handling distinguish mass-production equipment from engineering and reliability platforms

Full-wafer contactors high-voltage measurement and thermal uniformity constitute the main technical barriers

Market Trends

The SiC Wafer Burn-In Test System market is moving from engineering-oriented, single-wafer reliability verification toward automated and highly parallel production screening. System upgrades increasingly focus on combining HTGB and HTRB within the same hardware and test flow, monitoring leakage current for individual dies during stress, measuring parameters such as Vth before and after burn-in, and linking results with wafer maps and manufacturing traceability databases. Equipment configurations are evolving from single-chuck platforms to multi-chuck or multi-wafer architectures with cassette loading, automated alignment, contact verification and continuous production operation. Another important direction is the integration of wafer probing, burn-in, post-burn-in electrical testing and Known-Good-Die identification, enabling device manufacturers to remove potentially unreliable dies before incurring packaging and module-assembly costs. The transition of SiC manufacturing from 150 mm toward 200 mm wafers is also raising requirements for contactor planarity, thermal uniformity, channel density, wafer handling and test-data capacity. Systems are consequently becoming less like isolated reliability instruments and more like integrated semiconductor production equipment combining high-voltage stress, precision measurement, automation and process-control software.

Market Dynamics

Drivers

The principal driver is the increasing reliability requirement for SiC power devices used

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in high-voltage and mission-critical power-conversion systems. Automotive traction inverters, onboard chargers and charging infrastructure require stable device performance over long operating periods and across demanding temperature and voltage conditions. Wafer-level burn-in allows manufacturers to identify early-life failures before expensive packaging, module assembly and downstream qualification, improving the economic value of Known-Good-Die screening. The same requirement is extending to industrial motor drives, renewable-energy inverters, energy-storage systems and high-efficiency power supplies. Expansion of SiC wafer capacity and the introduction of additional 200 mm manufacturing lines also increase the number of wafers requiring scalable reliability screening. As device output rises, customers place greater value on automated loading, multi-wafer parallelism and data integration because these functions reduce manual intervention and improve the consistency of production quality control.

Restraints

Adoption is constrained by the relatively high investment and application-engineering requirements of complete wafer-level burn-in solutions. The equipment must combine high-voltage power supplies, precision low-current measurement, uniform wafer heating, high-density contacting and electrical isolation within one production-safe platform. Full-wafer contactors and probe cards are normally customised to device layout, pad geometry and wafer design, creating additional development time and recurring consumable expenditure. Burn-in cycles may occupy equipment for substantially longer periods than ordinary wafer electrical testing, making throughput, floor space and utilisation important purchasing considerations. Contact resistance drift, probe wear, wafer warpage and particles can also affect measurement consistency and production yield. These factors make the economic case more attractive for high-value automotive and industrial devices than for lower-priced devices whose packaging losses may not justify full-wafer burn-in.

Opportunities

The transition toward 8-inch SiC manufacturing represents a significant equipment opportunity because larger wafers increase the number of dies contacted, stressed, measured and traced during each cycle. Device manufacturers upgrading from engineering validation to production screening will require higher-channel-count test electronics, multi-wafer capacity, automated material handling and manufacturing-execution-system connectivity. Further opportunities exist in integrated workflows combining wafer acceptance testing, conventional electrical wafer sorting, burn-in, post-stress parameter testing and KGD mapping. Adaptive burn-in software may shorten unnecessary stress exposure by analysing leakage-current drift and other indicators in

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real time, improving both throughput and energy efficiency. Localised equipment and contactor supply in Asia can also reduce service response times and customised engineering costs. Beyond automotive applications, higher-voltage industrial drives, renewable energy, energy storage, rail traction and data center power infrastructure provide additional demand for reliability-screened SiC devices.

Challenges

A major challenge is the absence of a completely uniform burn-in configuration across different SiC device structures and manufacturing processes. Required voltage, temperature, stress duration, acceptable leakage-current limits and monitoring parameters may vary by MOSFET design, diode structure, wafer layout and customer qualification strategy. Equipment suppliers must therefore provide flexible channel architecture and software while maintaining measurement accuracy and production repeatability. Full-wafer contact reliability becomes more difficult as die count and wafer diameter increase, particularly when wafer bow, pad variation or thermal expansion affects planarity. Suppliers must also manage high-voltage safety, channel-level overcurrent protection, thermal runaway prevention and calibration stability. Long customer qualification cycles and dependence on semiconductor capacity investment can create uneven order timing, while the proprietary nature of contactors and test recipes limits standardisation and may increase customer concerns regarding long-term service and consumable availability.

Industry Chain Analysis

The upstream supply chain of SiC Wafer Burn-In Test System includes high-voltage and gate-bias power supplies, source-measure units, low-current measurement circuits, channel-control boards, overcurrent-protection devices, thermal chucks, heaters, temperature sensors, wafer aligners, motion-control systems, cameras, wafer cassettes and cleanroom-compatible mechanical components. Full-wafer contactors, probe cards and interface boards are particularly important because they determine contact density, voltage isolation, current-monitoring capability and compatibility with each wafer design. System software is another critical input, covering test-recipe development, channel configuration, real-time monitoring, wafer-map processing, failure logging, data correlation and factory communication protocols. These components must operate reliably under simultaneous high temperature, high voltage and high channel count, creating substantial requirements for electrical, thermal and mechanical integration.

Midstream suppliers design and assemble the test platform, integrate stress electronics with wafer probing and handling, develop application-specific contact solutions and

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validate performance using customer wafers. Downstream customers primarily include SiC integrated device manufacturers, power-semiconductor wafer fabs, foundries, specialised test houses and organisations conducting device qualification and reliability engineering. Value creation is concentrated in the ability to contact a large number of dies simultaneously, apply stable stress conditions, detect abnormal leakage at die level and convert test results into traceable KGD information. Hardware platforms generate initial equipment revenue, while customised contactors, probe cards, system expansion, software, calibration and maintenance create recurring business. Production-oriented systems generally provide greater automation and throughput value, whereas engineering platforms compete through flexibility, measurement capability and lower initial configuration cost.

Segment Insights

By burn-in and stress mode, HTRB Wafer Burn-In System and HTGB Wafer Burn-In System represent the fundamental product configurations. HTRB is used to apply elevated-temperature reverse drain bias and observe leakage or blocking-related instability, while HTGB stresses the gate structure and monitors gate leakage and parameter drift. Combined HTRB and HTGB Wafer Burn-In System is becoming more important because a shared platform can switch between stress modes, reduce equipment duplication and consolidate wafer data. Functional and Dynamic Wafer Burn-In System represents a more advanced direction, introducing switching conditions, body-diode stress or functional measurements that more closely reflect operating behaviour. The commercial value of a system therefore depends not only on its maximum voltage but also on channel independence, current-measurement resolution, stress flexibility and the ability to conduct pre-stress, in-situ and post-stress testing.

By supported wafer size, 6-inch platforms continue to serve the established SiC manufacturing base, while 8-inch compatibility is becoming a key requirement for new production investment and platform selection. Larger-diameter capability requires higher channel density, larger contact structures, tighter planarity control and increased test-data processing. By application stage, R&D and reliability-verification systems generally prioritise flexible recipes, detailed parametric measurement and access to individual channels. Engineering and pilot-production systems balance flexibility with limited automation and repeatability. Mass-production systems place greater emphasis on cassette-to-cassette handling, multi-wafer processing, automatic alignment, contact checking, continuous operation, map binding and factory-system integration. Platform modularity allows suppliers to serve these stages with a common electrical and software architecture while changing wafer handling, chuck count and channel capacity.

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Downstream Market Opportunities

Automotive is the most commercially developed downstream application for SiC Wafer Burn-In Test System because traction inverters, onboard chargers and other vehicle power systems require stringent reliability screening and traceability. Industrial-grade SiC devices used in motor drives, automation equipment and high-voltage power conversion provide a broader but more diverse demand base. Energy and power applications, including solar inverters, energy-storage converters and charging infrastructure, offer additional opportunities as operators place greater importance on service life and maintenance costs. Data center and communication power systems can benefit from lower-loss, high-frequency SiC conversion, supporting future demand for screened high-power devices. Rail transit, aerospace and defense applications have lower volumes but high reliability requirements, which favour detailed qualification and engineering-oriented systems. Consumer electronics and home appliances represent a more price-sensitive opportunity and are more likely to adopt wafer-level burn-in selectively for high-voltage or premium devices rather than as a universal screening process.

Regional Insights

Asia-Pacific is the principal manufacturing and deployment region for SiC Wafer Burn-In Test System, supported by expanding power-semiconductor production, automotive electronics manufacturing and a growing local semiconductor-equipment supply chain. China has become increasingly important in automotive-grade SiC wafer screening, local equipment development and integrated testing workflows covering wafer loading, burn-in, unloading and KGD testing. Japan and South Korea maintain established power-semiconductor, automotive and semiconductor-manufacturing capabilities, while Malaysia and Singapore have developed strong positions in semiconductor equipment, automated testing and outsourced manufacturing. The region’s opportunity is increasingly linked to 8-inch SiC investment, production-line automation and localisation of contactors, high-voltage test electronics and technical services.

North America and Europe remain important technology-development and high-value customer regions. North America has established expertise in multi-wafer full-wafer-contact test and burn-in systems and is home to major SiC materials, device and automotive qualification activities. European equipment suppliers emphasise modular reliability platforms, high-voltage measurement and integration between wafer-level and package-level testing, while European SiC manufacturers are expanding 200 mm production and vertically integrated power-semiconductor capacity. Regional purchasing

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requirements differ: high-volume factories prioritise throughput, automation and cost per die, whereas research centres and qualification laboratories place greater weight on test flexibility, detailed data access and compatibility with multiple device technologies. Future regional competition will depend on the proximity of application engineering, contactor design, maintenance support and customer qualification resources rather than system hardware alone.

Competitive Landscape Analysis

The SiC Wafer Burn-In Test System market is a specialised segment of semiconductor reliability equipment, with competition centred on full-wafer contacting, high-voltage parallel measurement, thermal control, wafer automation and production software. Aehr Test Systems has established a production-oriented position through multi-wafer platforms and proprietary full-wafer contactors, with disclosed use in SiC power-device production and automotive qualification. Pentamaster offers automated single- and multi-chuck systems supporting combined HTRB and HTGB, 6-inch and 8-inch wafers and different production-throughput configurations. EDA Industries and Microtest position their systems across R&D, reliability and manufacturing environments, emphasising modularity, functional and parametric testing, data analysis and compatibility with external or integrated probing platforms. NEXUSTEST and Asian suppliers including Semight Instruments are expanding fully automated SiC wafer burn-in, per-die leakage monitoring, Vth measurement, map generation and integrated KGD workflows. The competitive boundary remains narrower than the general semiconductor burn-in equipment market because suppliers of package-level ovens, environmental chambers or conventional wafer probers do not necessarily possess complete full-wafer SiC stress capability. Long-term differentiation will depend on installed production references, 8-inch readiness, contactor performance, cost per tested die, automation reliability, local service and the ability to customise test recipes without sacrificing platform standardisation.

Report Scope

This report studies the global SiC Wafer Burn-In Test System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for SiC Wafer Burn-In Test System 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 Wafer Burn-In Test System that

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contribute to its increasing demand across many markets.

Highlights and key features of the study

Global SiC Wafer Burn-In Test System total production and demand, 2021-2032, (Units)

Global SiC Wafer Burn-In Test System total production value, 2021-2032, (USD Million)

Global SiC Wafer Burn-In Test System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global SiC Wafer Burn-In Test System consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: SiC Wafer Burn-In Test System domestic production, consumption, key domestic manufacturers and share

Global SiC Wafer Burn-In Test System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global SiC Wafer Burn-In Test System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global SiC Wafer Burn-In Test System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global SiC Wafer Burn-In Test System 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 Chroma ATE Inc., Aehr Test Systems, Pentamaster Corporation Berhad, EDA Industries S.p.A., Microtest S.p.A., SEMIGHT INSTRUMENTS CO., LTD., Semitronix Corporation, UniSiC, Firstack, Hirel, etc.

This report also provides key insights about market drivers, restraints, opportunities,

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new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World SiC Wafer Burn-In Test System market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Units) and average price (K 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 Wafer Burn-In Test System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global SiC Wafer Burn-In Test System Market, Segmentation by Type:

HTRB Wafer Burn-In System

HTGB Wafer Burn-In System

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Combined HTRB and HTGB Wafer Burn-In System

Functional and Dynamic Wafer Burn-In System

Others

Global SiC Wafer Burn-In Test System Market, Segmentation by Wafer Size:

Up to 6-Inch SiC Wafer Burn-In System

8-Inch SiC Wafer Burn-In System

12-Inch and Above SiC Wafer Burn-In System

Others

Global SiC Wafer Burn-In Test System Market, Segmentation by Stage:

R&D and Reliability Verification System

Mass Production Wafer Burn-In System

Global SiC Wafer Burn-In Test System Market, Segmentation by Application:

Automotive-Grade SiC Power Devices

Industrial-Grade SiC Power Devices

Energy and Power-Grade SiC Devices

AI SiC Devices

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Rail Transit SiC Power Devices

Aerospace and Defense-Grade SiC Devices

Consumer Electronics and Home Appliance SiC Devices

Others

Companies Profiled:

Chroma ATE Inc.

Aehr Test Systems

Pentamaster Corporation Berhad

EDA Industries S.p.A.

Microtest S.p.A.

SEMIGHT INSTRUMENTS CO., LTD.

Semitronix Corporation

UniSiC

Firstack

Hirel

HangZhou ZoanRel Electronics Co.,Ltd

Key Questions Answered:

1. How big is the global SiC Wafer Burn-In Test System market?

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2. What is the demand of the global SiC Wafer Burn-In Test System market?
3. What is the year over year growth of the global SiC Wafer Burn-In Test System market?
4. What is the production and production value of the global SiC Wafer Burn-In Test System market?
5. Who are the key producers in the global SiC Wafer Burn-In Test System market?
6. What are the growth factors driving the market demand?

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