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Global Wide Band Gap (WBG) Power Device Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Wide Band Gap (WBG) Power Device market size is expected to reach $ 25140 million by 2032, rising at a market growth of 20.5% CAGR during the forecast period (2026-2032).

Wide Band Gap (WBG) Power Devices refer to power electronic components fabricated from semiconductor materials—such as Silicon Carbide (SiC) and Gallium Nitride (GaN)—whose band gaps are significantly wider than that of traditional Silicon (Si). Their definition is rooted in the superior physical properties these materials provide—including higher breakdown electric fields, higher electron saturation velocity, and higher thermal conductivity. This enables WBG devices to operate at higher voltages, higher frequencies, and higher temperatures than silicon counterparts while achieving extremely low energy loss. The major product types are currently concentrated in two material systems: 1. Silicon Carbide (SiC), with primary products being SiC MOSFETs and SiC SBDs (Schottky Barrier Diodes), which are progressively replacing high-voltage Si-based IGBTs and MOSFETs. 2. Gallium Nitride (GaN), primarily GaN HEMTs (High Electron Mobility Transistors), typically grown on silicon substrates (GaN-on-Si), which demonstrate immense advantages in low-to-mid voltage, high-frequency markets. Major application areas are distinct: SiC, with its high-voltage tolerance, dominates New Energy Vehicles (especially 800V-architecture main inverters and OBCs), Renewable Energy (PV inverters), and industrial motor drives. GaN, leveraging its high switching frequency, excels in Consumer Electronics (compact fast chargers), Data Centers (high-efficiency server PSUs), and automotive Lidar systems.

The WBG power device value chain is well-defined, yet its value is highly concentrated upstream. The Upstream—representing the primary technology barrier—involves substrate manufacturing and epitaxial (Epi) growth. For SiC, the yield and speed of

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boule (SiC ingot) growth constitute the main bottleneck, with substrate costs accounting for 30%-50% of the total device cost; Wolfspeed (Cree), Coherent (II-VI), and Rohm (SiCrystal) hold a dominant position here. For GaN, this involves primarily GaN-on-Si epiwafers. The Midstream covers device design, fabrication, and packaging. This segment is dominated by IDMs (Integrated Device Manufacturers) because WBG processes (e.g., high-temperature ion implantation) are incompatible with standard silicon CMOS fabs and require dedicated lines. Representative IDMs include Infineon, STMicroelectronics, ON Semiconductor, Wolfspeed, and Rohm. Concurrently, the GaN sector also features Fabless (e.g., Navitas, Innoscience) and Foundry (e.g., TSMC, X-Fab) models. The Downstream consists of system application integrators, including Automotive Tier-1 suppliers (e.g., Bosch, Vitesco), EV OEMs (e.g., Tesla, BYD), consumer electronics brands (e.g., Apple, Anker), server manufacturers (e.g., Dell, HPE), and PV inverter companies (e.g., SMA, SolarEdge).

Currently, the WBG power device industry is on the cusp of an explosive growth ramp-up. The current industry status is characterized by a 'SiC shortage and GaN acceleration.' On the SiC front, market demand—particularly from automotive main inverters—is far outpacing the capacity expansion of upstream substrates, leading to a persistent global shortage of SiC devices. To secure capacity, downstream customers (like Automotive Tier-1s) have widely entered into Long-Term Agreements (LTAs) with midstream IDMs. To alleviate cost pressures and scale production, major players are aggressively transitioning from 6-inch (150mm) to 8-inch (200mm) wafer fabrication, which is the current focal point of competition. On the GaN front, having achieved mass commercialization and cost validation in the consumer fast-charging market, it is now at a critical inflection point, penetrating higher-value segments such as data center PSUs and automotive OBCs/DC-DC converters. Capital Expenditure (CapEx) is at an all-time high, with major IDMs investing billions to construct new SiC fabs, while GaN players explore higher-integration solutions (e.g., GaN ICs).

Looking ahead, the future trends for the WBG power device industry will involve the parallel advancement of technology and cost reduction. 1. Scaling of 8-inch SiC Wafers: The transition to 200mm wafers is the primary pathway to reducing SiC device costs, enabling their adoption from premium EVs into mainstream models. 2. Integration of GaN: GaN will evolve from discrete components to 'GaN ICs'—integrating drivers, controllers, and protection circuits on-chip. This drastically simplifies system design and is key to its success in data centers and automotive sectors. 3. Advanced Module Packaging: Innovative packaging (e.g., double-sided cooling, copper-clip bonding) is critical to fully leveraging the high-temperature and high-frequency performance of WBG devices. The industry's core driving factors are the ultimate global pursuits of 'Energy

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Efficiency' and 'Electrification': 1. Automotive Electrification (800V Architecture): This is the most powerful single driver. The 800V high-voltage platform enables faster charging and higher efficiency, and SiC is a rigid requirement to achieve this. 2. AI and Data Center Energy Consumption: The explosion in AI computing power has caused data center energy usage to surge. Adopting high-efficiency GaN and SiC PSUs has become an imperative for reducing TCO and achieving carbon neutrality. 3. Renewable Energy Grid Integration: The demand for high-efficiency, high-power-density inverters in PV and energy storage systems provides a vast industrial market for SiC.

This report studies the global Wide Band Gap (WBG) Power Device production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Wide Band Gap (WBG) Power Device 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 Wide Band Gap (WBG) Power Device that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Wide Band Gap (WBG) Power Device total production and demand, 2021-2032, (K Units)
Global Wide Band Gap (WBG) Power Device total production value, 2021-2032, (USD Million)
Global Wide Band Gap (WBG) Power Device production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)
Global Wide Band Gap (WBG) Power Device consumption by region & country, CAGR, 2021-2032 & (K Units)
U.S. VS China: Wide Band Gap (WBG) Power Device domestic production, consumption, key domestic manufacturers and share
Global Wide Band Gap (WBG) Power Device production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)
Global Wide Band Gap (WBG) Power Device production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)
Global Wide Band Gap (WBG) Power Device production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Wide Band Gap (WBG) Power Device market based on the following parameters - company overview, production, value, price,

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gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include STMicroelectronics, Infineon (GaN Systems), Wolfspeed, Rohm, onsemi, BYD Semiconductor, Microchip (Microsemi), Mitsubishi Electric, 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 Wide Band Gap (WBG) Power Device 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 Wide Band Gap (WBG) Power Device Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Wide Band Gap (WBG) Power Device Market, Segmentation by Type:

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SiC MOSFET Module

SiC MOSFET Discretes

SiC Diode

GaN Power Devices

Global Wide Band Gap (WBG) Power Device Market, Segmentation by Material:

SiC Power Device

GaN Power Device

Global Wide Band Gap (WBG) Power Device Market, Segmentation by Device Voltage:

1200V

650V

750V

Others

Global Wide Band Gap (WBG) Power Device Market, Segmentation by Company Type:

IDM

Fabless

Global Wide Band Gap (WBG) Power Device Market, Segmentation by Application:

Automotive & Mobility

Industrial Motor/Drive

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PV, Energy Storage, Wind Power

Grid and Energy

UPS, Data Center & Server

Rail Transport

Consumer Electronics

Defence & Aerospace

Others

Companies Profiled:

STMicroelectronics

Infineon (GaN Systems)

Wolfspeed

Rohm

onsemi

BYD Semiconductor

Microchip (Microsemi)

Mitsubishi Electric

Semikron Danfoss

Fuji Electric

Navitas Semiconductor

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Toshiba

San'an Optoelectronics

Littelfuse

CETC 55

WeEn Semiconductors

BASiC Semiconductor

SemiQ

Diodes Incorporated

SanRex

Alpha & Omega Semiconductor

Bosch

Power Integrations, Inc.

Efficient Power Conversion Corporation (EPC)

Innoscience

Sanken Electric

KEC Corporation

PANJIT Group

Nexperia

Vishay Intertechnology

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Zhuzhou CRRC Times Electric

China Resources Microelectronics Limited

StarPower

Yangzhou Yangjie Electronic Technology

Guangdong AccoPower Semiconductor

Changzhou Galaxy Century Microelectronics

Hangzhou Silan Microelectronics

MacMic Science & Technology

Jiangsu Jiejie Microelectronics

NCEPOWER

PN Junction Semiconductor (Hangzhou)

United Nova Technology (UNT)

InventChip Technology (IVCT)

Leadrive Technology

HAIMOSIC (SHANGHAI)

Suzhou Sko Semiconductor

Shenzhen Aishite Technology

Suzhou Xizhi Technology

Archimedes Semiconductor (Hefei)

Grecon Semiconductor (Shanghai)

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Hebei Sinopack Electronic Technology

ZhiXin Semiconductor

Key Questions Answered:

1. How big is the global Wide Band Gap (WBG) Power Device market?
2. What is the demand of the global Wide Band Gap (WBG) Power Device market?
3. What is the year over year growth of the global Wide Band Gap (WBG) Power Device market?
4. What is the production and production value of the global Wide Band Gap (WBG) Power Device market?
5. Who are the key producers in the global Wide Band Gap (WBG) Power Device market?
6. What are the growth factors driving the market demand?

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