

Global Power SiC Manufacturing Equipment Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Power SiC Manufacturing Equipment market size was valued at US\$ 3133 million in 2025 and is forecast to a readjusted size of US\$ 7079 million by 2032 with a CAGR of 13.2% during review period.

Power SiC manufacturing equipment spans the full chain from SiC substrate (boule-to-wafer) through epitaxy, device fabrication, and often module/package test. On the substrate side, the toolset typically covers crystal growth, slicing (wire-sawing / laser-splitting), characterization (defect density, resistivity), and finishing (surface grinding, polishing/CMP, cleaning). On the epitaxy side, high-temperature SiC epitaxy reactors are a core capex item; representative commercial platforms explicitly target 150/200 mm power-epi production (e.g., AIXTRON G10-SiC, ASM PE208, LPE SiC epitaxy reactors). On the device-fab side, the equipment set follows the SiC process flow—lithography, dry etch, film deposition, metallization, ion implantation, and high-temperature thermal treatments/anneals, plus extensive inline measurement and inspection/SPC.

Equipment demand is driven by three buyer groups: (i) SiC substrate manufacturers and in-house substrate lines at vertically integrated IDMs, (ii) epiwafer suppliers / IDM epitaxy lines, and (iii) power-device fabs producing SiC MOSFETs/diodes (and increasingly integrated module operations). ST's publicly shared "vertical integration" view explicitly lays out the value chain from SiC crystal > substrate & epitaxy > device fabrication > packaging & final test, reflecting how capex is allocated across the chain. End-market pull is concentrated in electrification and high-efficiency power conversion, with major power players highlighting electric vehicles, renewable energy, and AI/data-

center power as key application domains for SiC.

Technically, SiC imposes distinct equipment requirements versus silicon. Substrate manufacturing is anchored by PVT (Physical Vapor Transport) as a widely used SiC single-crystal growth method, requiring high-temperature furnaces and growth-control know-how; industrial suppliers explicitly position PVT systems for SiC crystal growth. Downstream, the substrate process sequence (growth > slicing > characterization > finishing/cleaning) is quality-determining because defectivity and wafer geometry propagate into epitaxy and die yield. In device fabrication, public industry material stresses that SiC often requires optimization around wafer thinning, dry etching, heated implantation and anneal, and ohmic contact formation, consistent with the flow blocks shown by SEMI/ST (epitaxy > implantation > thermal treatments > deposition/metallization > lithography/etch > outgoing). Practically, fabs also flag execution challenges such as defectivity control, bow/warpage management, long/high-temperature thermal steps, implant control, and thin-wafer handling, which directly translate into demand for tighter process control, automation, and higher-sensitivity metrology/inspection.

The industry is in a clear scale-up and industrialization phase, with a visible shift toward 200 mm SiC to lower cost per die and improve manufacturing productivity. Major power-device leaders explicitly state the move to 200 mm SiC manufacturing (e.g., Infineon's annual reporting) and announce high-volume 200 mm SiC facilities (e.g., ST's Catania plans), while Wolfspeed emphasizes consolidating around 200 mm production and commercializing a 200 mm materials portfolio (including epitaxy qualification). In parallel, epitaxy-tool vendors are scaling 200 mm-capable platforms and shipment milestones (e.g., AIXTRON's G10-SiC product positioning and shipment updates), reinforcing that epitaxy remains a strategic bottleneck and differentiation point. Structurally, the supply chain can be summarized as raw materials & consumables > crystal growth / wafering & finishing tools > epi reactors > wafer-fab process tools (implant/anneal/etch/deposition/metallization/litho) + metrology/inspection > packaging/module + test, with a growing trend toward vertical integration and "campus" models that bring multiple steps under one IDM footprint.

This report is a detailed and comprehensive analysis for global Power SiC Manufacturing Equipment market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Equipment Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected

competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Power SiC Manufacturing Equipment market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Power SiC Manufacturing Equipment market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Power SiC Manufacturing Equipment market size and forecasts, by Equipment Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Power SiC Manufacturing Equipment market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for Power SiC Manufacturing Equipment
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global Power SiC Manufacturing Equipment market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Applied Materials, KLA SPTS, Lam, Tel, Axcelis, Centrotherm, ULVAC, PVA TePla, NAURA, Kokusai, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Power SiC Manufacturing Equipment market is split by Equipment Type and by

Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Equipment Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Equipment Type

SiC Epitaxy/HTCVD

SiC Thin-Film Deposition & Metallization

Thermal Processing

Thinning and CMP

SiC Plasma Etch & Ash/Strip

Wafer Cleaning & Surface Preparation

SiC Ion Implanters

Lithography & Track (Coater/Developer)

SiC Metrology and Inspection

Others

Market segment by Wafer Size

150mm SiC Equipment

200mm SiC Equipment

Others

Market segment by Device Type

SiC MOSFET

SiC Diode

Others

Market segment by Application

SiC Substrate Manufacturing

SiC Epitaxy Manufacturing

SiC Device Manufacturing

Major players covered

Applied Materials

KLA SPTS

Lam

Tel

Axcelis

Centrotherm

ULVAC

PVA TePla

NAURA

Kokusai

SCREEN

Sumitomo

Nissin Ion

Oxford Instruments

ASML

Nikon

Canon

AIXTRON

ASM/LPE

Accretech

DISCO

Okamoto

Lasertec

Advantest

Teradyne

Crystal Growth & Energy Equipment Inc.

Han's Laser Technology Industry

Beijing TSD Semiconductor Co., Ltd.

Shenzhen Naso Tech

Beijing U-Precision Tech

AMIES Technology

Gurui Semiconductor Equipment (Guangzhou)

Angkun Vision (Beijing) Technology

Market segment by region, regional analysis covers
North America (United States, Canada, and Mexico)
Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)
Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)
South America (Brazil, Argentina, Colombia, and Rest of South America)
Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Power SiC Manufacturing Equipment product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Power SiC Manufacturing Equipment, with price, sales quantity, revenue, and global market share of Power SiC Manufacturing Equipment from 2021 to 2026.

Chapter 3, the Power SiC Manufacturing Equipment competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Power SiC Manufacturing Equipment breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Equipment Type and by Application, with sales market share and growth rate by Equipment Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Power SiC Manufacturing Equipment market forecast, by regions, by

Equipment Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Power SiC Manufacturing Equipment.

Chapter 14 and 15, to describe Power SiC Manufacturing Equipment sales channel, distributors, customers, research findings and conclusion.

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