

USA Wide-Bandgap Power Semiconductor Market - Strategic Insights and Forecasts (2026-2031)

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Abstracts

The USA Wide-Bandgap Semiconductors Market is forecast to grow from USD 322.1 million in 2026 to USD 646.3 million by 2031, at a CAGR of 14.9%.

The USA Wide-Bandgap Power Semiconductor market is at the forefront of the shift from conventional silicon power devices to advanced wide-bandgap (WBG) materials such as silicon carbide (SiC) and gallium nitride (GaN). This transition is driven by accelerating electrification in automotive applications, renewable energy integration, and high-performance industrial power systems. Federal incentives such as the CHIPS & Science Act de-risk domestic wafer and device capacity expansion and improve competitive positioning versus global suppliers. Despite notable supply chain constraints and tariff headwinds on raw materials, demand from electric vehicle OEMs, data center power systems, and renewable inverter platforms underpins broad market growth. Domestic capacity additions and strategic wafer supply contracts are reshaping procurement dynamics and shortening delivery cycles for US customers.

Market Drivers

The electrification of transportation and demand for high-efficiency EV traction inverters are core growth drivers. SiC and GaN devices meet the performance requirements for higher switching frequencies and superior thermal efficiency relative to silicon, making them essential for vehicle range extension and fast-charging infrastructure deployment. Demand from data centers and industrial power systems for efficient high-voltage modules further accelerates growth. Policy levers such as the CHIPS & Science Act and advanced manufacturing tax credits directly lower capital costs for domestic fabs, incentivizing OEM commitments to US-produced wafers and devices.

Industrial electrification and renewable energy systems such as solar inverters and grid-connected power converters contribute to demand expansion. Higher power density and reduced losses enable system designers to optimize size and cooling costs, creating strong technical anchors for WBG adoption across sectors.

Market Restraints

Tariff structures on imported SiC and GaN substrates and epitaxial wafers present an ongoing constraint, exposing US producers to fluctuating duties and supply variability. Supply-side bottlenecks in high-quality substrate manufacturing create price volatility, which can delay OEM design cycles and slow broad silicon-to-WBG migrations. Qualified production ramp rates for advanced wafer platforms and consistent yield improvement challenges remain headwinds for supply chain scalability.

Technology and Segment Insights

By Material / Technology

The market is segmented by wide-bandgap material types, including silicon carbide (SiC), gallium nitride (GaN), diamond, gallium oxide, and aluminium nitride. SiC holds a dominant position due to its superior high-voltage performance, efficiency, and thermal characteristics, particularly in EV traction and inverter applications. The shift to 150 mm and 200 mm SiC wafer platforms is improving per-wafer die output and reducing overall manufacturing costs. Gallium nitride is gaining traction for high-frequency, lower-power applications such as fast chargers and telecom power modules.

By Application

Key application segments include hybrid and electric vehicles, data centers, renewable energy generation, and motor drives. Hybrid and electric vehicles remain the largest near-term addressable application, with SiC-based power devices enabling higher efficiency and extended EV range. Data center power density requirements and renewable energy inverter systems also represent significant application demand pools for high-efficiency WBG devices.

By End-User

End-users include automotive and transportation, industrial and manufacturing, and energy and utilities. The automotive and transportation segment is a primary growth

engine, propelled by electrification mandates and charging infrastructure development. Industrial and manufacturing sectors adopt WBG devices for high-efficiency motor drives and power control systems, while energy and utility users incorporate them into renewable energy systems and grid modernization initiatives.

Competitive and Strategic Outlook

The competitive environment features a mix of global semiconductor leaders and specialized WBG material innovators. Key companies active in the US market include Wolfspeed, ROHM (SiCrystal), STMicroelectronics, Infineon, Microchip Technology, Analog Devices, Texas Instruments, Navitas, Mitsubishi Electric, and Semikron Danfoss. Wolfspeed's domestic SiC wafer capacity expansion and significant CHIPS Act-linked investments position it as a central supplier for US device manufacturers. Infineon and STMicroelectronics are advancing 200 mm SiC production and next-generation SiC MOSFET product portfolios, strengthening competitive supply capabilities.

The USA Wide-Bandgap Power Semiconductor market is poised for robust growth through 2031, driven by structural electrification trends, domestic policy support, and technological advances in SiC and GaN power devices. While supply chain constraints and raw material tariffs present challenges, expanding domestic production capacity and sustained end-user demand in automotive, data center, and renewable applications will underpin market expansion. Vendors that secure long-term wafer supplies and deliver differentiated device performance will capture significant opportunities in this high-growth market.

Key Benefits of this Report

Insightful Analysis: Gain detailed market insights across regions, customer segments, policies, socio-economic factors, consumer preferences, and industry verticals.

Competitive Landscape: Understand strategic moves by key players to identify optimal market entry approaches.

Market Drivers and Future Trends: Assess major growth forces and emerging developments shaping the market.

Actionable Recommendations: Support strategic decisions to unlock new

revenue streams.

Caters to a Wide Audience: Suitable for startups, research institutions, consultants, SMEs, and large enterprises.

What Businesses Use Our Reports For

Industry and market insights, opportunity assessment, product demand forecasting, market entry strategy, geographical expansion, capital investment decisions, regulatory analysis, new product development, and competitive intelligence.

Report Coverage

Historical Data: 2021-2024, Base Year: 2025, Forecast Years: 2026-2031

Growth opportunities, challenges, supply chain outlook, regulatory framework, and trend analysis

Competitive positioning, strategies, and market share evaluation

Revenue growth and forecast assessment across segments and regions

Company profiling including strategies, products, financials, and key developments

Contents

1. EXECUTIVE SUMMARY

2. MARKET SNAPSHOT

- 2.1. Market Overview
- 2.2. Market Definition
- 2.3. Scope of the Study
- 2.4. Market Segmentation

3. BUSINESS LANDSCAPE

- 3.1. Market Drivers
- 3.2. Market Restraints
- 3.3. Market Opportunities
- 3.4. Porter's Five Forces Analysis
- 3.5. Industry Value Chain Analysis
- 3.6. Policies and Regulations
- 3.7. Strategic Recommendations

4. TECHNOLOGICAL OUTLOOK

5. USA WIDE-BANDGAP POWER SEMICONDUCTOR MARKET BY MATERIAL

- 5.1. Introduction
- 5.2. Silicon Carbide
- 5.3. Gallium Nitride
- 5.4. Diamond
- 5.5. Gallium Oxide
- 5.6. Aluminium Nitride

6. USA WIDE-BANDGAP POWER SEMICONDUCTOR MARKET BY APPLICATION

- 6.1. Introduction
- 6.2. Data Centers
- 6.3. Renewable Energy Generation
- 6.4. Hybrid and Electric Vehicles
- 6.5. Motor Drives

7. USA WIDE-BANDGAP POWER SEMICONDUCTOR MARKET BY END-USERS

- 7.1. Introduction
- 7.2. Automotive and Transportation
- 7.3. Industrial and Manufacturing
- 7.4. Energy and Utilities
- 7.5. Information and Communication Technology (ICT)
- 7.6. Aerospace and Defense

8. COMPETITIVE ENVIRONMENT AND ANALYSIS

- 8.1. Major Players and Strategy Analysis
- 8.2. Market Share Analysis
- 8.3. Mergers, Acquisitions, Agreements, and Collaborations
- 8.4. Competitive Dashboard

9. COMPANY PROFILES

- 9.1. ROHM Semiconductor
- 9.2. Wolfspeed, Inc.
- 9.3. STMicroelectronics
- 9.4. Infineon Technologies AG
- 9.5. Mitsubishi Electric Corporation
- 9.6. Semikron Danfoss
- 9.7. Texas Instruments
- 9.8. Analog Devices, Inc.
- 9.9. Navitas Semiconductor
- 9.10. Microchip Technology Inc.

10. RESEARCH METHODOLOGY

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