

Global IGBT Module for New Energy Vehicle (NEV) Market Growth 2026-2032

<https://marketpublishers.com/r/GFB0A2E898BFEN.html>

Date: May 2026

Pages: 129

Price: US\$ 3,660.00 (Single User License)

ID: GFB0A2E898BFEN

Abstracts

The global IGBT Module for New Energy Vehicle (NEV) market size is predicted to grow from US\$ 3405 million in 2025 to US\$ 8376 million in 2032; it is expected to grow at a CAGR of 13.7% from 2026 to 2032.

IGBT Modules for New Energy Vehicles (NEVs) are automotive-qualified power modules that integrate multiple silicon IGBT chips and freewheeling diodes (often with NTC temperature sensing and low-inductance internal layout) to form the switching ?engine? of NEV power conversion?most notably the main traction inverter, which converts battery DC into AC for the e-motor and supports regenerative operation. Compared with general industrial IGBT modules, NEV-grade modules are engineered around lifetime and harsh-environment requirements (power cycling / thermal cycling, vibration, humidity) and are increasingly aligned with industry qualification practices such as ECPE AQG 324, which targets power modules used in automotive converter units. In product typing, the mainstream NEV module families cluster around 750 V and 1200 V classes (to match 400 V?800 V vehicle architectures), and are offered as standard inverter building blocks (e.g., six-pack / three-phase bridge, half-bridge variants) on scalable package footprints.

In terms of global market status and applications, NEV IGBT modules remain a large-volume solution for a wide range of BEVs (especially cost-optimized platforms) and for HEV/PHEV traction systems, even as SiC grows rapidly in premium-efficiency designs. The demand base is anchored by EV scale: IEA reports electric car sales topped 17 million in 2024, and news-tracked registrations suggest continued growth into 2025 (with forecasts of slower growth in 2026 amid policy and regional demand shifts). While the traction inverter is the main value pool, NEV IGBT modules also appear in auxiliary motor inverters (e-compressor, pumps, fans) and certain high-voltage conversion

stages depending on OEM architecture and cost/efficiency targets. From the supply side, leading global and regional suppliers emphasize platformized NEV lines: Infineon positions HybridPACK² Drive as a scalable 750 V / 1200 V traction module family with AQG324 qualification, Semikron Danfoss positions DCM³ as a traction platform scalable across 750-1200 V and wide current ranges, and CRRC Times Electric/Dynex highlight EV IGBT ranges spanning 750-1200 V with both flat baseplate and pin-fin variants for different power/cooling needs.

Looking forward, the key trends are: (1) higher power density via direct liquid cooling, optimized thermal stacks, and lower stray inductance; (2) longer lifetime via stronger interconnect/attach and more robust substrate/material choices; and (3) system-ready⁴ qualification and testing standardization across OEM/Tier1⁵ module supply chains. Fuji Electric's automotive IGBT materials, for example, explicitly link downsizing⁶ to direct liquid-cooling structures as a route to lower thermal resistance and higher module compactness. Competitive dynamics are therefore shifting from pure silicon performance to package + cooling + lifetime modelling + automotive qualification + scale manufacturing; at the same time, the long-term coexistence with SiC drives more hybrid roadmaps (Si IGBT plus SiC diodes, or parallel platform families offering both). Along the value chain, upstream is silicon wafers and IGBT/diode front-end manufacturing; midstream is module packaging (ceramic substrates, baseplate/direct-cooling plates, interconnect/encapsulation, test and reliability qualification); and downstream is inverter/PCU makers and OEMs that validate thermal management, lifetime, and vehicle-level performance⁷ so winning⁸ suppliers are those who can deliver qualified, scalable traction platforms with proven lifetime under real drive cycles.

LP Information, Inc. (LPI)'s newest research report, the "IGBT Module for New Energy Vehicle (NEV) Industry Forecast" looks at past sales and reviews total world IGBT Module for New Energy Vehicle (NEV) sales in 2025, providing a comprehensive analysis by region and market sector of projected IGBT Module for New Energy Vehicle (NEV) sales for 2026 through 2032. With IGBT Module for New Energy Vehicle (NEV) sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world IGBT Module for New Energy Vehicle (NEV) industry.

This Insight Report provides a comprehensive analysis of the global IGBT Module for New Energy Vehicle (NEV) landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on IGBT Module for New Energy Vehicle (NEV) portfolios and capabilities,

market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global IGBT Module for New Energy Vehicle (NEV) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for IGBT Module for New Energy Vehicle (NEV) and breaks down the forecast By Voltage, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global IGBT Module for New Energy Vehicle (NEV).

This report presents a comprehensive overview, market shares, and growth opportunities of IGBT Module for New Energy Vehicle (NEV) market by product type, application, key manufacturers and key regions and countries.

Segmentation By Voltage:

650V/750V IGBT Modules

1200V IGBT Modules

Segmentation by EV Type:

BEV

HEV/PHEV

Segmentation by Application:

Electric Vehicle (EV) Traction Inverter

DC-DC, and OBC

Electric Vehicle (EV) Charging Station

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Infineon

Mitsubishi Electric

Fuji Electric

Zhuzhou CRRC Times Electric

BYD Semiconductor

Semikron Danfoss

StarPower

onsemi

Denso

Hangzhou Silan Microelectronics

Bosch

United Nova Technology (UNT)

Microchip (Microsemi)

Grecon Semiconductor (Shanghai)

GeePak

Archimedes Semiconductor (Hefei)

Hefei Cpower Technology

ZhiXin Semiconductor

MacMic Science & Technolog

Key Questions Addressed in this Report

What is the 10-year outlook for the global IGBT Module for New Energy Vehicle (NEV) market?

What factors are driving IGBT Module for New Energy Vehicle (NEV) market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do IGBT Module for New Energy Vehicle (NEV) market opportunities vary by end market size?

How does IGBT Module for New Energy Vehicle (NEV) break out By Voltage, by Application?

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