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Global Power Module Potting Equipment Market Growth 2026-2032

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Abstracts

The global Power Module Potting Equipment market size is predicted to grow from US$ 251 million in 2025 to US$ 452 million in 2032; it is expected to grow at a CAGR of 8.6% from 2026 to 2032.

Power Module Potting Equipment refers to specialized manufacturing systems used in power semiconductor module packaging to meter, mix, degas, dispense and encapsulate liquid insulating materials around semiconductor dies, interconnects, terminals, DBC or AMB substrates and other electrically active structures. The equipment is designed to achieve controlled filling volume, material ratio, vacuum level and process consistency while reducing entrapped air and voids that can affect dielectric performance and long-term reliability. Typical equipment configurations include stand-alone or offline potting machines, in-line vacuum potting systems and integrated potting lines, with single-chamber, dual-chamber or multi-chamber architectures. Depending on process requirements, systems may handle one-component or two-component silicone gel, epoxy resin, polyurethane and other insulating materials through piston, gear-pump or progressive-cavity metering technologies. Advanced configurations integrate material conditioning, vacuum degassing, automatic conveying, weighing, vision positioning, process monitoring, recipe management and manufacturing traceability. The research scope focuses on Power Module Potting Equipment used in IGBT, SiC and other power semiconductor module production for automotive electrification, industrial power conversion, renewable energy, energy storage, railway, grid and high-power supply applications.

Key Findings

2025 global equivalent shipments are estimated at approximately 1,050–1,250 Power

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Module Potting Equipment systems

Vacuum potting is the mainstream process route for high-reliability power module encapsulation and mass-production quality control

China Europe and Japan form the principal verified production clusters for Power Module Potting Equipment

Three-stage and multi-chamber vacuum architectures are gaining importance in high-throughput automated power module production

Market Trends

Power Module Potting Equipment is moving from relatively independent dispensing machines toward integrated vacuum processing cells with higher throughput, tighter process control and stronger digital traceability. Vacuum potting is increasingly combined with material degassing, precision 1K or 2K metering, automated handling, weight verification and production-line communication, while three-stage and multi-chamber configurations are gaining relevance where evacuation time would otherwise constrain takt time. Product development is also shifting from basic dispensing accuracy toward comprehensive control of bubbles, voids, material ratios, viscosity conditions, vacuum profiles and repeatability. Power module production lines disclosed by established automation suppliers already integrate dedicated vacuum gel injection or vacuum potting stations, while high-volume vacuum dispensing platforms emphasize reproducible filling, multi-nozzle processing and line integration. These developments indicate that future product differentiation will increasingly depend on process stability, automation architecture and integration capability rather than the dispensing mechanism alone.

Market Dynamics

Drivers

Demand for Power Module Potting Equipment is supported by continued electrification of transportation, expansion of power semiconductor capacity and rising use of high-efficiency power conversion across renewable energy, energy storage and industrial systems. Electric vehicles are particularly important because traction inverters require high-reliability IGBT or SiC power modules, and electric cars represented about one quarter of global new-car sales in 2025. Wider adoption of SiC and other wide-bandgap

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technologies is also increasing the importance of dielectric reliability and controlled packaging processes in high-voltage environments. In parallel, regional semiconductor localization and new power-device production capacity are creating equipment demand beyond replacement cycles. The underlying demand environment therefore reflects both growth in module output and increasing process intensity per production line, although equipment demand remains more cyclical than semiconductor unit consumption because capacity additions occur through discrete capital expenditure programs.

Restraints

The main restraints arise from the capital-intensive and project-driven nature of the equipment market. A high-throughput vacuum potting cell can serve a large number of modules, meaning equipment demand does not increase proportionally with power semiconductor shipments. Improvements in cycle time, multi-nozzle dispensing and multi-chamber processing can further increase installed capacity per machine and reduce the number of systems required for a given output level. Purchasing decisions are also sensitive to customer capital expenditure cycles, factory utilization and the timing of new module platforms. In addition, lower-cost standardized dispensing systems create pricing pressure in less demanding applications, while fully customized automotive-grade solutions require longer engineering and qualification periods. A structural restraint is the gradual adoption of transfer-molded, compression-molded and other highly integrated module packages in selected applications, which can reduce dependence on conventional case-and-gel potting architectures and limit long-term unit demand for traditional potting equipment.

Opportunities

The clearest opportunities are concentrated in higher-value vacuum systems rather than basic atmospheric dispensing. Three-stage and multi-chamber machines can separate evacuation, filling and pressure-release operations, creating opportunities to improve throughput without sacrificing void control. Higher-voltage SiC module programs also increase demand for accurate material preparation, low-bubble filling, process monitoring and traceability, supporting greater equipment value per production cell. Another opportunity comes from upgrading existing module lines: customers may add new vacuum chambers, metering units, automatic handling, weight inspection or MES connectivity without replacing an entire line. China remains particularly important for localization opportunities, as domestic equipment suppliers are expanding from conventional two-component dispensing into dedicated IGBT and SiC vacuum potting systems. Suppliers able to combine potting with adjacent processes such as thermal-interface dispensing, bonding, curing, inspection and automated material handling can

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capture a larger share of customer capital expenditure while reducing dependence on a single packaging step.

Challenges

The principal challenge is converting equipment capability into repeatable production performance across different module designs and material formulations. Silicone gels, epoxies and polyurethane systems can differ substantially in viscosity, mixing ratio, filler characteristics, pot life and sensitivity to temperature or moisture, requiring equipment suppliers to maintain strong application-engineering expertise. Automotive and other high-reliability customers also demand extended qualification, stable takt time, traceability and low defect rates, creating a meaningful barrier for new entrants. At the same time, customized project requirements limit standardization and can increase engineering costs, delivery complexity and after-sales requirements. Competitive pressure from regional suppliers is intensifying, particularly in China, while changes in power module architecture could shift demand between liquid potting and molding technologies. Equipment companies therefore need to balance platform standardization with customer-specific engineering and maintain sufficient flexibility to support both IGBT and emerging SiC packaging formats.

Industry Chain Analysis

The upstream chain of Power Module Potting Equipment consists primarily of precision fluid-control components, vacuum systems, motion-control and automation hardware, process sensors and machine structures. Key technical inputs include piston, gear-pump and progressive-cavity metering units, dispensing valves and nozzles, vacuum pumps and chambers, material tanks and conditioning systems, heaters, servo systems, PLCs, industrial computers, weighing devices, vision systems and software interfaces. Silicone gel, epoxy and polyurethane suppliers are also important participants in the broader process ecosystem because material viscosity, mixing ratio, curing behavior and filler content directly influence equipment design and parameter selection. Upstream component quality affects dispensing accuracy, vacuum stability, uptime and maintenance cost, while software and sensing content is becoming a larger source of functional differentiation.

The midstream is composed of specialized Power Module Potting Equipment manufacturers, precision dispensing companies and turnkey power module automation providers. Value creation is concentrated in fluid-process engineering, vacuum-process design, material recipe development, automation integration, cycle-time optimization

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and production qualification rather than in mechanical assembly alone. Downstream users are power semiconductor module manufacturers and packaging operations serving automotive electrification, industrial drives, renewable energy and energy storage, rail transit, power-grid equipment and high-power supplies. Equipment purchasing typically forms part of a broader packaging-line capital program, which means suppliers with the ability to integrate dispensing, vacuum processing, conveying, inspection, curing and traceability can capture higher system value. After-sales engineering, spare parts, process optimization and line upgrades also contribute to lifecycle value, particularly for highly automated installations.

Segment Insights

By product type, the market can be divided into stand-alone or offline equipment, in-line potting equipment and integrated potting lines. Stand-alone systems retain a role in development, flexible production and lower-volume applications, while in-line and integrated configurations have greater strategic importance in automotive and high-volume power semiconductor manufacturing because they reduce manual handling and improve traceability. By potting environment, vacuum potting represents the core high-reliability segment, while atmospheric systems remain applicable where module geometry and reliability requirements are less demanding. Within vacuum equipment, single-chamber systems offer simpler layouts, whereas dual-chamber and three-or-more-chamber architectures increasingly target higher throughput by separating or overlapping process stages.

Material and metering architecture provide a second layer of segmentation. Two-component systems are particularly important for silicone gel, epoxy and other reactive materials used in power module encapsulation, while piston, gear-pump and progressive-cavity technologies compete according to dosing volume, viscosity, flow stability, filler content and maintenance requirements. From an automation perspective, the market is shifting toward fully automatic and integrated systems, although semi-automatic equipment remains commercially relevant for smaller-volume or flexible manufacturing. The strongest product opportunity is therefore not a single pump technology, but systems that combine vacuum processing, stable 2K metering, automated quality verification and production-line integration.

Downstream Market Opportunities

New energy vehicles represent the most important incremental application for Power Module Potting Equipment because traction inverters combine high semiconductor

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content with stringent voltage, thermal and reliability requirements. Electric cars accounted for approximately one quarter of global new-car sales in 2025, reinforcing continued investment in power module production even as regional growth rates fluctuate. Beyond automotive, renewable-energy inverters, energy-storage power conversion systems and industrial drives provide a broader demand base and reduce dependence on a single end market. Data-center and high-power supply applications are also becoming more relevant as power density and conversion efficiency requirements increase. Opportunities are strongest where module manufacturers need low-void encapsulation, higher automation, rapid product changeover and complete production traceability rather than basic resin dispensing alone.

Regional Insights

From the supply-side perspective, China is the largest verified manufacturing cluster in the Core Formal List, representing 9 of the 19 confirmed parent-level manufacturers. Europe and Japan each contribute 4 verified core manufacturers, while North America and Taiwan account for the remaining suppliers. This manufacturer distribution should not be interpreted directly as regional revenue share, but it highlights a clear difference in competitive structure: Europe is particularly strong in vacuum technology, precision metering and engineered dispensing platforms; Japan combines precision fluid control with turnkey power module automation; and China has the broadest pool of specialized local suppliers and is rapidly expanding in three-stage vacuum potting, in-line automation and localized IGBT/SiC production equipment.

Demand conditions also differ by region. China combines a large domestic power semiconductor manufacturing base with strong electric-vehicle penetration, while Europe continues to support electrification and advanced power-electronics investment. In 2025, electric vehicles represented close to 55% of new-car sales in China and around 28% in Europe, providing a supportive downstream environment for power-module capacity and packaging equipment demand. Japan remains strategically important because of its established power semiconductor and automation ecosystem, while North American opportunities are more concentrated in advanced manufacturing investment, specialized vacuum processing and broader power-electronics applications. India and Southeast Asia remain emerging equipment markets, with local manufacturing capability still less developed than in the principal production clusters.

Competitive Landscape Analysis

The competitive landscape of Power Module Potting Equipment is fragmented and

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technology-led, with no verified evidence supporting a single supplier dominating the narrow global market on a revenue basis. After subsidiary and group consolidation, the Core Formal List contains 19 confirmed parent-level manufacturers. Larger international groups such as Atlas Copco, through the Scheugenpflug business, and MAX Automation, through bdtronic, compete through established vacuum dispensing platforms, global engineering resources and installed-base support, while HIRATA and OSAI are differentiated by their ability to integrate vacuum gel injection or potting directly into turnkey power module assembly lines. MUSASHI and several specialized Japanese and European suppliers compete through precision fluid-control and application-engineering expertise. Chinese manufacturers including Guangdong Anda Automation Solutions, Shenzhen Second Intelligent Equipment and other specialist suppliers are strengthening competition through localized engineering, shorter customization cycles, three-stage vacuum architectures and competitive system costs. The market therefore contains a combination of multinational dispensing platforms, turnkey automation specialists and regional niche OEMs. Competitive advantage increasingly depends on achieving low-void filling at production takt time, maintaining material-ratio stability, supporting multiple module and resin configurations, integrating inspection and traceability, and providing responsive application support. Scale alone is insufficient to define leadership because several smaller specialists have stronger direct exposure to IGBT or SiC module potting than much larger general-purpose dispensing groups.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Power Module Potting Equipment 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 Power Module Potting Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Power Module Potting Equipment market.

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This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Power Module Potting Equipment and breaks down the forecast by Type, 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 Power Module Potting Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Power Module Potting Equipment market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Stand-alone Potting Equipment

In-line Potting Equipment

Integrated Potting Line

Segmentation by Potting Environment:

Atmospheric Potting

Vacuum Potting

Other

Segmentation by Number of Vacuum Chambers:

Single-chamber System

Dual-chamber System

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Three-or-more-chamber System

Segmentation by Metering Technology:

Piston Metering

Gear Pump Metering

Progressive Cavity / Screw Metering

Segmentation by Application:

Industrial Automation

Renewable Energy & Energy Storage

Rail Transit

Data Centers & Power Supplies

Other Applications

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

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APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

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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.

Atlas Copco AB

HIRATA Corporation

MAX Automation SE

Guangdong Anda Automation Solutions Co., Ltd.

MUSASHI ENGINEERING, INC.

OSAI Automation System S.p.A. Societ? Benefit

Shenzhen Second Intelligent Equipment Co., Ltd.

HOLS (Suzhou) Automation Co., Ltd.

Jiangsu Gaoke Precision Fluid Technology Co., Ltd.

Naka Liquid Control Co., Ltd.

dosmatix GmbH

M&K

Suzhou Veady Precision Control System Co., Ltd.

Shenzhen Xinyinda Keji Youxian Gongsi (XETAR)

Abbess Instruments and Systems, Inc.

Suzhou Hanxun Jiqiren Xitong Youxian Gongsi

GLADWAVE TECHNOLOGY CO., LTD.

Suzhou SHARP-TOP INTELLIGENCE Co., Ltd.

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Dongguan GooGio Machinery Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Power Module Potting Equipment market?

What factors are driving Power Module Potting Equipment market growth, globally and by region?

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

How do Power Module Potting Equipment market opportunities vary by end market size?

How does Power Module Potting Equipment break out by Type, by Application?

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