

Global Power SiC Manufacturing Equipment Market Growth 2026-2032

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Abstracts

The global Power SiC Manufacturing Equipment market size is predicted to grow from US\$ 2978 million in 2025 to US\$ 7029 million in 2032; it is expected to grow at a CAGR of 14.0% from 2026 to 2032.

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.

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

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

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

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

Segmentation 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

Segmentation by Wafer Size:

150mm SiC Equipment

200mm SiC Equipment

Others

Segmentation by Device Type:

SiC MOSFET

SiC Diode

Others

Segmentation by Application:

SiC Substrate Manufacturing

SiC Epitaxy Manufacturing

SiC Device Manufacturing

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.

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

Key Questions Addressed in this Report

What is the 10-year outlook for the global Power SiC Manufacturing Equipment market?

What factors are driving Power SiC Manufacturing Equipment market growth, globally and by region?

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

How do Power SiC Manufacturing Equipment market opportunities vary by end market size?

How does Power SiC Manufacturing Equipment break out by Equipment Type, by Application?

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