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Global Press Pack IGBTs Market Growth 2026-2032

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Abstracts

The global Press Pack IGBTs market size is predicted to grow from US$ 115 million in 2025 to US$ 323 million in 2032; it is expected to grow at a CAGR of 15.2% from 2026 to 2032.

Press-pack IGBTs are an alternative to isolated-base plastic modules. Instead of the wire bonds and solder joints used in isolated-base modules, press-packs rely on the application of force by an external clamping system, to make contact to the chips. This report studies the press pack IGBTs (PPI), 4500V, 6500V, 3300V, 1700V, etc.

Press-Pack IGBTs are high-power insulated-gate bipolar transistor devices in which the semiconductor chips, electrodes and internal conductors establish their principal electrical and thermal contacts through externally applied mechanical pressure. Unlike conventional insulated IGBT modules that commonly use bond wires, solder joints and an electrically insulated baseplate, press-pack devices are clamped directly between cooling plates and normally support double-sided cooling, low package inductance, high power-cycling capability and controlled short-circuit failure behaviour. These characteristics make them particularly suitable for high-current converters containing large numbers of semiconductor devices connected in series. The market scope includes conventional Press-Pack IGBTs, Toshiba’s Press-Pack IEGTs and Hitachi Energy’s press-pack BiGT/StakPak devices, because these products use closely related insulated-gate bipolar semiconductor technologies and target the same high-power converter applications. The mainstream commercial voltage class is 4.5 kV, typically covering rated currents of approximately 1.5–3.0 kA or higher, while non-4.5 kV products include 6.5 kV devices, Hitachi Energy’s 5.2 kV reverse-conducting BiGT products, and smaller 3.3 kV, 2.5 kV and selected lower-voltage products. Infineon currently positions 4.5 kV Press-Pack IGBTs for HVDC, FACTS, traction, wind power and medium-voltage drives, while Toshiba has expanded the commercial market toward 6.5 kV/2.0 kA Press-Pack IEGTs for DC transmission, STATCOM and industrial motor

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drives.

Press-Pack IGBTs are generally procured in concentrated batches for individual HVDC converter valves, offshore transmission systems, STATCOM installations and large industrial converters, and device deliveries may occur well before project commissioning. Consequently, annual market results are strongly influenced by the timing of customer qualification, converter-valve production, project acceptance and spare-device procurement. After the 2022 trough, revenue recovered by 49.2% in 2023, 26.6% in 2024 and 19.6% in 2025, indicating that the industry has entered a new expansion cycle. Growth is expected to remain above 19% during 2026–2028 before moderating as the market becomes larger. The sector nevertheless remains relatively small in unit terms because each device carries a high value and serves specialized infrastructure rather than general-purpose power-electronics applications.

HVDC & FACTS represents the overwhelmingly dominant application, accounting for an estimated 92.59% of global Press-Pack IGBT revenue in 2025 and rising to 94.94% by 2032. The segment includes VSC-HVDC and MMC converter valves, offshore-wind transmission, cross-border interconnectors, city-centre infeeds, back-to-back frequency conversion, STATCOM and selected high-voltage DC circuit breakers. Hitachi Energy confirms that its HVDC Light platform uses IGBT/BiGT press-pack StakPak modules, including a 5.2 kV/2.0 kA reverse-conducting device developed for the Dogger Bank offshore-wind transmission system. Infineon similarly identifies IGBT press packs as a core device platform for high-power VSC-HVDC systems based on MMC topologies, while Toshiba highlights HVDC, active reactive-power compensation and medium-voltage inverters as principal Press-Pack IEGT applications. Industrial and medium-voltage drives account for a much smaller share, declining from 4.07% in 2025 to 2.73% in 2032 despite continued absolute growth. Relevant systems include mining hoists, compressors, pumps, rolling mills, marine propulsion and other multi-megawatt drives. Traction, electric vehicles and other applications decline from 3.34% to 2.33% of revenue; within this category, rail traction, railway power conversion, replacement devices and specialized heavy-duty systems are substantially more important than mainstream passenger electric vehicles, which predominantly use automotive-qualified isolated IGBT or SiC modules.

China is the largest demand market, accounting for an estimated 62.58% of global revenue in 2025 and approximately 63.41% in 2032. Its dominant position reflects large-scale flexible-HVDC investment, offshore-wind transmission, domestic converter-valve manufacturing and the localization of high-voltage power semiconductors. Europe is the second-largest market, with a projected share of 15.26% in 2032, supported by North

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Sea offshore-wind connections, German transmission corridors, UK offshore projects and cross-border interconnectors. North America is expected to maintain a share of approximately 9%, while Japan, South Korea, India and Southeast Asia remain smaller, project-specific markets. The competitive landscape is highly concentrated but undergoing structural change. Zhuzhou CRRC Times Semiconductor became the estimated market leader in 2025 with a 27.39% revenue share, followed by Littelfuse at 22.64%, Hitachi Energy at 19.22% and Toshiba at 11.94%. NARI Technology and Infineon increased their estimated shares to 8.77% and 8.18%, respectively, indicating the simultaneous rise of Chinese domestic substitution and a new major European entrant. The combined share of CRRC Times Semiconductor, NARI Technology and Beijing Xinchuang Chunshu Rectifier reached approximately 36.65% in 2025, while the Other category declined to only 0.45%. This concentration reflects demanding reliability qualification, proprietary package technology, long customer approval cycles and the close integration required between semiconductor suppliers and converter-valve manufacturers.

The principal industry trend is the increasing concentration of demand in high-voltage grid infrastructure, particularly offshore-wind HVDC, long-distance VSC transmission, STATCOM and other flexible-grid systems. The IEA expects global electricity consumption to continue expanding as industry, air conditioning, electric vehicles, heat pumps, artificial intelligence and other electricity-intensive technologies increase load, requiring substantial strengthening and expansion of transmission networks. Product development is moving toward higher blocking voltages, higher current ratings, reverse-conducting chip structures, lower losses and more compact converter valves. The 4.5 kV platform will remain the principal commercial standard, but 5.2 kV and 6.5 kV products are expected to gain share where reducing the number of series-connected devices, gate drivers and cooling positions provides significant system-level value. At the same time, Chinese suppliers will continue moving from engineering validation toward project-scale deployment, increasing pricing competition and second-source availability. The industry will remain subject to substantial annual volatility because HVDC projects require long development cycles and depend on the availability of cables, transformers and other grid equipment; the IEA reports that prices and procurement times for key transmission components have increased materially, potentially shifting semiconductor deliveries between forecast years. Overall, market growth will be driven by grid modernization, renewable-energy integration, offshore wind, higher transmission voltages, demand for compact and fault-tolerant converter systems, and the increasing strategic importance of secure high-power semiconductor supply chains.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Press Pack IGBTs and breaks down the forecast by VCES (Max), 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 Press Pack IGBTs.

This report presents a comprehensive overview, market shares, and growth opportunities of Press Pack IGBTs market by product type, application, key manufacturers and key regions and countries.

Segmentation by VCES (Max):

4.5kV Press-pack IGBTs

Others

Segmentation by Application:

HVDC & FACTS

Industrial & Medium Voltage Drives

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Traction & Electric Vehicles and Others

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

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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.

Littelfuse (IXYS)

Hitachi Energy

Toshiba

Zhuzhou CRRC Times Semiconductor

Infineon

Poseico S.p.A.

Nari Technology

Beijing Xinchuang Chunshu Rectifier

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Key Questions Addressed in this Report

What is the 10-year outlook for the global Press Pack IGBTs market?

What factors are driving Press Pack IGBTs market growth, globally and by region?

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

How do Press Pack IGBTs market opportunities vary by end market size?

How does Press Pack IGBTs break out by VCES (Max), by Application?

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