

Power Electronics Market by Device Type (Power Discrete, Power Module, Power IC), Material (Si, SiC, GaN), Voltage (Low, Medium, High), Vertical (ICT, Consumer Electronics, Industrial, Automotive, Aerospace) and Geography - Global Forecast to 2028

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Abstracts

The global power electronics market was valued at USD 46.2 billion in 2023 to USD 61.0 billion by 2028; it is expected to grow at a CAGR of 5.7% from 2023 to 2028. The integration of power electronics into automotive and transportation systems is essential for optimizing energy efficiency, reducing emissions, and advancing the overall performance and capabilities of modern vehicles. The growing emphasis on energy efficiency and conservation prompts industries to adopt power electronics solutions that optimize energy usage, reduce losses, and enhance overall system performance.

Key players operating in the Power Electronics Market are Infineon Technologies AG (Germany), ON Semiconductor (US), STMicroelectronics (Switzerland), Mitsubishi Electric Corporation (Japan), and Vishay Intertechnology, Inc. (US).

The power modules device type is projected to grow at the highest CAGR during the forecast period.

Power modules find widespread application in power conversion for motor drives, uninterruptible power supplies (UPS), and AC-DC power supplies. Their significant usage extends to renewable energy sources like wind turbines and solar panels, as well as the electric vehicle sector. Power modules play a pivotal role in elevating system performance and energy efficiency by offering enhanced power density, increased system ruggedness, and reliability. The surge in demand for power modules is propelled by the escalating requirements for high power efficiency across various applications.

Factors such as the rising adoption of electric vehicles, increasing deployment of renewable energy sources, establishment of charging stations, industrial growth, and a growing market for consumer appliances collectively contribute to the growth of this segment.

SiC and GaN-based power electronics are projected to have higher growth during the forecast period.

The markets for SiC- and GaN-based power electronics devices are projected to experience substantial growth. The primary driver is the increasing demand from automotive manufacturers who are adopting SiC-based devices for the production of electric and hybrid vehicles. SiC-based devices find application in inverters, enhancing their efficiency. Additionally, SiC-based power electronics solutions offer heightened reliability, greater efficiency, elevated operating temperature capacity, compact size, and increased voltage capabilities compared to Si-based counterparts. Consequently, SiC-based technology is utilized in various sectors, including photovoltaics, charging infrastructure, and uninterruptible power supply (UPS). The deployment of 5G networking in communications is also expected to contribute to the future growth of SiC. Furthermore, advancements in manufacturing technology are anticipated to pave the way for the high growth potential of low-cost GaN devices in the future.

Asia Pacific region is likely to grow at the highest CAGR.

The power electronics market in the Asia-Pacific region has experienced significant growth, driven by the influential presence of key market players that have fueled the regional market's expansion. China, as a prominent country with a substantial manufacturing sector for diverse electronic products, has played a significant role in driving the growth of the power electronics market in the Asia-Pacific region. Electronic devices produced in China are equipped with power electronic components, further augmenting the expansion of the power electronics market in this region.

Breakdown of primaries

The study contains insights from various industry experts, ranging from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type - Tier 1 – 40%, Tier 2 – 35%, Tier 3 – 25%

By Designation— C-level Executives - 35%, Manager - 40%, Others – 25%

By Region—North America - 40%, Europe - 20%, Asia Pacific - 30%, RoW - 10%

The power electronics market is dominated by a few globally established players such as Infineon Technologies AG (Germany), ON Semiconductor (US), STMicroelectronics (Switzerland), Mitsubishi Electric Corporation (Japan), Vishay Intertechnology, Inc. (US), Fuji Electric Co., Ltd. (Japan), NXP Semiconductors (Netherlands), Renesas Electronics Corporation (Japan), Texas Instruments Incorporated (US), TOSHIBA CORPORATION (Japan). The study includes an in-depth competitive analysis of these key players in the power electronics market, with their company profiles, recent developments, and key market strategies.

Research Coverage:

The report segments the power electronics market and forecasts its size by device type, material, voltage, vertical, and region. The report also discusses the drivers, restraints, opportunities, and challenges pertaining to the market. It gives a detailed view of the market across four main regions— North America, Europe, Asia Pacific, and RoW. Supply chain analysis has been included in the report, along with the key players and their competitive analysis in the power electronics ecosystem.

Key Benefits to Buy the Report:

Analysis of Key Drivers (High adoption of renewable power sources, Rapid development of electric vehicles, huge demand for power electronics in consumer, enterprises, and automotive verticals). Restraints (Complex design and integration process). Opportunities (Wide bandgap semiconductors promoting new applications of power electronics, Growing investments by governments, private organizations, research institutes, and manufacturers to increase SiC production) and Challenges (Material defects and designing and packaging issues in SiC power devices).

Product Development/Innovation: Detailed insights on upcoming technologies, research and development activities, and new product launches in the power electronics market.

Market Development: Comprehensive information about lucrative markets – the report analyses the power electronics market across varied regions

Market Diversification: Exhaustive information about new products and services, untapped geographies, recent developments, and investments in the power electronics market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players like Infineon Technologies AG (Germany), ON Semiconductor (US), STMicroelectronics (Switzerland), Mitsubishi Electric Corporation (Japan), Vishay Intertechnology, Inc. (US) among others in the power electronics market.

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Details on Business Overview, Products/Solutions/Services Offered, Recent Developments, MnM view (Key strengths/Right to win, Strategic choices made, Weakness/competitive threats) might not be captured in case of unlisted companies.

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