

Europe Wide Bandgap Semiconductor Market Size, Share, Trends & Analysis by Material (Aluminum Nitride, Boron Nitride, Silicon Carbide, Gallium Nitride, Others), by Device Type (Power Devices, RF Devices, Optoelectronic Devices), by Application (Information and Communication Technology, Automotive, Defense and Aerospace, Consumer Electronics, Others) and Region, with Forecasts from 2025 to 2034.

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Abstracts

The Europe Wide Bandgap (WBG) Semiconductor Market is projected to experience strong growth from 2025 to 2034, supported by the rising adoption of electric vehicles, renewable energy systems, and high-performance electronics. Wide bandgap semiconductors, such as silicon carbide (SiC) and gallium nitride (GaN), offer superior thermal conductivity, higher breakdown voltages, and faster switching speeds compared to conventional silicon semiconductors. These characteristics are making them critical for power devices, RF components, and optoelectronic applications across multiple industries. Valued at USD XX.XX billion in 2025, the European WBG market is expected to grow at a CAGR of XX.XX%, reaching USD XX.XX billion by 2034.

Definition and Scope of Wide Bandgap Semiconductors

Wide bandgap semiconductors are advanced materials with larger bandgaps than silicon, enabling operation at higher voltages, frequencies, and temperatures. Key materials include silicon carbide (SiC), gallium nitride (GaN), aluminum nitride (AlN), and boron nitride (BN). These semiconductors are increasingly applied in energy-efficient power electronics, high-speed communication systems, aerospace, defense,

and consumer electronics, driving Europe's transition toward sustainable and next-generation technologies.

Market Drivers

Electrification of Mobility in Europe: The region's strong focus on electric vehicles (EVs) and charging infrastructure is significantly increasing demand for SiC- and GaN-based devices that enhance performance and reduce energy losses.

Renewable Energy Integration: With Europe's ambitious renewable energy targets, WBG semiconductors are being deployed in solar inverters, wind turbines, and smart grid applications to improve efficiency and reliability.

5G Deployment and ICT Growth: Expanding 5G networks and advanced ICT infrastructure across Europe are fueling demand for GaN-based RF devices to support high-speed and high-frequency communications.

Aerospace and Defense Investments: Europe's aerospace and defense industries are increasingly using WBG semiconductors for radar, satellite communications, and power electronics requiring high efficiency and durability.

Market Restraints

High Production and Material Costs: Manufacturing of SiC and GaN semiconductors is cost-intensive compared to silicon, limiting adoption in cost-sensitive applications.

Limited Fabrication Ecosystem: Europe's WBG semiconductor ecosystem is still developing, with dependence on global suppliers for substrates and wafers.

Integration Challenges: Designing systems that fully leverage WBG properties requires advanced expertise, slowing down adoption among smaller players.

Opportunities

EU Support for Semiconductor Manufacturing: European Union initiatives such

as the European Chips Act are expected to boost regional WBG semiconductor production, strengthening supply chain resilience.

Growth in EV and Charging Infrastructure: Accelerated investments in EVs and fast-charging stations across Germany, France, and Nordic countries present significant opportunities for SiC- and GaN-based power devices.

Consumer Electronics Demand: Rising adoption of compact, energy-efficient consumer electronics is supporting wider integration of WBG devices in laptops, smartphones, and gaming systems.

Industrial Automation and Smart Manufacturing: Increasing digitization and smart factory initiatives across Europe create strong demand for efficient power electronics, where WBG semiconductors have a competitive edge.

Market Segmentation Analysis

By Material

Aluminum Nitride

Boron Nitride

Silicon Carbide

Gallium Nitride

Others

By Device Type

Power Devices

RF Devices

Optoelectronic Devices

By Application

Information and Communication Technology

Automotive

Defense and Aerospace

Consumer Electronics

Others

Regional Insights

Germany: Leads the market with strong EV adoption, advanced automotive manufacturing, and significant R&D investments in power electronics.

France: Growing demand from aerospace, defense, and renewable energy sectors is boosting WBG semiconductor adoption.

United Kingdom: ICT expansion, defense applications, and government support for advanced semiconductors are driving market growth.

Nordic Countries: Strong focus on renewable energy integration and smart grids is creating opportunities for SiC- and GaN-based devices.

Rest of Europe: Countries such as Italy and Spain are contributing to growth through renewable energy projects and automotive demand.

Competitive Landscape

The Europe Wide Bandgap Semiconductor Market is competitive, with companies focusing on innovation, capacity expansion, and partnerships to strengthen their market position. Key players in the market include:

STMicroelectronics N.V.

Infineon Technologies AG

Rohm Semiconductor Europe

Wolfspeed, Inc.

NXP Semiconductors N.V.
United Silicon Carbide Inc. (Qorvo)
Texas Instruments Incorporated
Navitas Semiconductor
GaN Systems Inc.
Microchip Technology Inc.

Contents

1. INTRODUCTION

- 1.1. Definition and Scope of Wide Bandgap Semiconductors
- 1.2. Objectives of the Report
- 1.3. Research Methodology
- 1.4. Assumptions and Limitations

2. EXECUTIVE SUMMARY

- 2.1. Key Market Highlights
- 2.2. Market Snapshot
- 2.3. Overview of Materials, Device Types, and Applications
- 2.4. Analyst Recommendations

3. MARKET DYNAMICS

- 3.1. Market Drivers
 - 3.1.1. Growing Demand for Electric Vehicles and Renewable Energy Integration in Europe
 - 3.1.2. Expansion of 5G Infrastructure and ICT Applications
 - 3.1.3. Strong Government Support for Semiconductor and Clean Energy Technologies
 - 3.1.4. Other Drivers
- 3.2. Market Restraints
 - 3.2.1. High Manufacturing and Fabrication Costs
 - 3.2.2. Complex Integration with Legacy Silicon-Based Systems
 - 3.2.3. Other Restraints
- 3.3. Market Opportunities
 - 3.3.1. Increasing R&D Investments and Industry Collaborations in Europe
 - 3.3.2. Expansion of Defense and Aerospace Applications
 - 3.3.3. Rising Demand for GaN and SiC in Consumer Electronics
 - 3.3.4. Other Opportunities
- 3.4. Market Challenges
 - 3.4.1. Supply Chain Dependence on Limited Global Sources
 - 3.4.2. Competition from Established Semiconductor Technologies
 - 3.4.3. Standardization and Quality Assurance Issues

4. EUROPE WIDE BANDGAP SEMICONDUCTOR MARKET ANALYSIS

- 4.1. Market Size and Forecast (2025–2034)
- 4.2. Market Share Analysis by:
 - 4.2.1. Material
 - 4.2.1.1. Aluminum Nitride (AlN)
 - 4.2.1.2. Boron Nitride (BN)
 - 4.2.1.3. Silicon Carbide (SiC)
 - 4.2.1.4. Gallium Nitride (GaN)
 - 4.2.1.5. Others
 - 4.2.2. Device Type
 - 4.2.2.1. Power Devices
 - 4.2.2.2. RF Devices
 - 4.2.2.3. Optoelectronic Devices
 - 4.2.3. Application
 - 4.2.3.1. Information and Communication Technology (ICT)
 - 4.2.3.2. Automotive
 - 4.2.3.3. Defense and Aerospace
 - 4.2.3.4. Consumer Electronics
 - 4.2.3.5. Others
- 4.3. Technology Trends and Innovations in Wide Bandgap Semiconductors
- 4.4. Cost Structure and Value Chain Analysis
- 4.5. Regulatory and Policy Landscape in Europe
- 4.6. SWOT Analysis
- 4.7. Porter's Five Forces Analysis

5. COUNTRY-LEVEL MARKET ANALYSIS

- 5.1. Germany
 - 5.1.1. Market Overview
 - 5.1.2. Market Size and Forecast
 - 5.1.3. Key Trends and Developments
 - 5.1.4. Competitive Landscape
- 5.2. United Kingdom
 - 5.2.1. Market Overview
 - 5.2.2. Market Size and Forecast
 - 5.2.3. Key Trends and Developments
 - 5.2.4. Competitive Landscape
- 5.3. France
 - 5.3.1. Market Overview

- 5.3.2. Market Size and Forecast
- 5.3.3. Key Trends and Developments
- 5.3.4. Competitive Landscape
- 5.4. Italy
 - 5.4.1. Market Overview
 - 5.4.2. Market Size and Forecast
 - 5.4.3. Key Trends and Developments
 - 5.4.4. Competitive Landscape
- 5.5. Rest of Europe
 - 5.5.1. Market Overview
 - 5.5.2. Market Size and Forecast
 - 5.5.3. Key Trends and Developments
 - 5.5.4. Competitive Landscape

6. COMPETITIVE LANDSCAPE

- 6.1. Market Share Analysis of Key Players
- 6.2. Company Profiles
 - 6.2.1. STMicroelectronics N.V.
 - 6.2.2. Infineon Technologies AG
 - 6.2.3. Rohm Semiconductor Europe
 - 6.2.4. Wolfspeed, Inc.
 - 6.2.5. NXP Semiconductors N.V.
 - 6.2.6. United Silicon Carbide Inc. (Qorvo)
 - 6.2.7. Texas Instruments Incorporated
 - 6.2.8. Navitas Semiconductor
 - 6.2.9. GaN Systems Inc.
 - 6.2.10. Microchip Technology Inc.
- 6.3. Strategic Developments: Mergers, Acquisitions, Partnerships
- 6.4. Focus on R&D and Technological Advancements

7. FUTURE OUTLOOK AND MARKET FORECAST

- 7.1. Investment Opportunities and Market Expansion in Europe (2025–2034)
- 7.2. Trends Toward Energy-Efficient and High-Performance Devices
- 7.3. Integration with Renewable Energy, EVs, and Smart Grids
- 7.4. Strategic Recommendations for Stakeholders

8. KEY INSIGHTS AND SUMMARY OF FINDINGS

9. FUTURE PROSPECTS FOR THE EUROPE WIDE BANDGAP SEMICONDUCTOR MARKET

List Of Tables

LIST OF TABLES

Table 1: Europe Wide Bandgap Semiconductor Market, By Material, 2025–2034 (USD Million)

Table 2: Europe Wide Bandgap Semiconductor Market, By Device Type, 2025–2034 (USD Million)

Table 3: Europe Wide Bandgap Semiconductor Market, By Application, 2025–2034 (USD Million)

Table 4: Europe Wide Bandgap Semiconductor Market, By Region, 2025–2034 (USD Million)

Table 5: Germany Wide Bandgap Semiconductor Market, By Material, 2025–2034 (USD Million)

Table 6: Germany Wide Bandgap Semiconductor Market, By Device Type, 2025–2034 (USD Million)

Table 7: Germany Wide Bandgap Semiconductor Market, By Application, 2025–2034 (USD Million)

Table 8: UK Wide Bandgap Semiconductor Market, By Material, 2025–2034 (USD Million)

Table 9: UK Wide Bandgap Semiconductor Market, By Device Type, 2025–2034 (USD Million)

Table 10: UK Wide Bandgap Semiconductor Market, By Application, 2025–2034 (USD Million)

Table 11: France Wide Bandgap Semiconductor Market, By Material, 2025–2034 (USD Million)

Table 12: France Wide Bandgap Semiconductor Market, By Device Type, 2025–2034 (USD Million)

Table 13: France Wide Bandgap Semiconductor Market, By Application, 2025–2034 (USD Million)

Table 14: Italy Wide Bandgap Semiconductor Market, By Material, 2025–2034 (USD Million)

Table 15: Italy Wide Bandgap Semiconductor Market, By Device Type, 2025–2034 (USD Million)

Table 16: Italy Wide Bandgap Semiconductor Market, By Application, 2025–2034 (USD Million)

Table 17: Spain Wide Bandgap Semiconductor Market, By Material, 2025–2034 (USD Million)

Table 18: Spain Wide Bandgap Semiconductor Market, By Device Type, 2025–2034

(USD Million)

Table 19: Spain Wide Bandgap Semiconductor Market, By Application, 2025–2034

(USD Million)

Table 20: Rest of Europe Wide Bandgap Semiconductor Market, By Material, 2025–2034 (USD Million)

Table 21: Rest of Europe Wide Bandgap Semiconductor Market, By Device Type, 2025–2034 (USD Million)

Table 22: Rest of Europe Wide Bandgap Semiconductor Market, By Application, 2025–2034 (USD Million)

Table 23: Europe Wide Bandgap Semiconductor Market, Strategic Developments, 2025–2034

Table 24: Europe Wide Bandgap Semiconductor Market, Mergers & Acquisitions, 2025–2034

Table 25: Europe Wide Bandgap Semiconductor Market, New Product Launches, 2025–2034

Table 26: Europe Wide Bandgap Semiconductor Market, Collaborations & Partnerships, 2025–2034

Table 27: Europe Wide Bandgap Semiconductor Market, Investment Trends, 2025–2034

Table 28: Europe Wide Bandgap Semiconductor Market, Technological Advancements, 2025–2034

Table 29: Europe Wide Bandgap Semiconductor Market, Regulatory Landscape, 2025–2034

Table 30: Europe Wide Bandgap Semiconductor Market, Future Trends & Opportunities, 2025–2034

Table 31: Europe Wide Bandgap Semiconductor Market, Competitive Landscape, 2025–2034

List Of Figures

LIST OF FIGURES

Figure 1: Europe Wide Bandgap Semiconductor Market: Market Segmentation

Figure 2: Europe Wide Bandgap Semiconductor Market: Research Methodology

Figure 3: Top-Down Approach

Figure 4: Bottom-Up Approach

Figure 5: Data Triangulation and Validation

Figure 6: Europe Wide Bandgap Semiconductor Market: Drivers, Restraints, Opportunities, and Challenges

Figure 7: Europe Wide Bandgap Semiconductor Market: Porter's Five Forces Analysis

Figure 8: Europe Wide Bandgap Semiconductor Market: Value Chain Analysis

Figure 9: Europe Wide Bandgap Semiconductor Market Share Analysis, By Material, 2025–2034

Figure 10: Europe Wide Bandgap Semiconductor Market Share Analysis, By Device Type, 2025–2034

Figure 11: Europe Wide Bandgap Semiconductor Market Share Analysis, By Application, 2025–2034

Figure 12: Europe Wide Bandgap Semiconductor Market Share Analysis, By Region, 2025–2034

Figure 13: Germany Wide Bandgap Semiconductor Market Share Analysis, By Material, 2025–2034

Figure 14: Germany Wide Bandgap Semiconductor Market Share Analysis, By Device Type, 2025–2034

Figure 15: Germany Wide Bandgap Semiconductor Market Share Analysis, By Application, 2025–2034

Figure 16: UK Wide Bandgap Semiconductor Market Share Analysis, By Material, 2025–2034

Figure 17: UK Wide Bandgap Semiconductor Market Share Analysis, By Device Type, 2025–2034

Figure 18: UK Wide Bandgap Semiconductor Market Share Analysis, By Application, 2025–2034

Figure 19: France Wide Bandgap Semiconductor Market Share Analysis, By Material, 2025–2034

Figure 20: France Wide Bandgap Semiconductor Market Share Analysis, By Device Type, 2025–2034

Figure 21: France Wide Bandgap Semiconductor Market Share Analysis, By Application, 2025–2034

Figure 22: Italy Wide Bandgap Semiconductor Market Share Analysis, By Material, 2025–2034

Figure 23: Italy Wide Bandgap Semiconductor Market Share Analysis, By Device Type, 2025–2034

Figure 24: Italy Wide Bandgap Semiconductor Market Share Analysis, By Application, 2025–2034

Figure 25: Spain Wide Bandgap Semiconductor Market Share Analysis, By Material, 2025–2034

Figure 26: Spain Wide Bandgap Semiconductor Market Share Analysis, By Device Type, 2025–2034

Figure 27: Spain Wide Bandgap Semiconductor Market Share Analysis, By Application, 2025–2034

Figure 28: Rest of Europe Wide Bandgap Semiconductor Market Share Analysis, By Material, 2025–2034

Figure 29: Rest of Europe Wide Bandgap Semiconductor Market Share Analysis, By Device Type, 2025–2034

Figure 30: Rest of Europe Wide Bandgap Semiconductor Market Share Analysis, By Application, 2025–2034

Figure 31: Europe Wide Bandgap Semiconductor Market: Competitive Benchmarking

Figure 32: Europe Wide Bandgap Semiconductor Market: Vendor Share Analysis, 2025–2034

Figure 33: Europe Wide Bandgap Semiconductor Market: Key Player Strategies

Figure 34: Europe Wide Bandgap Semiconductor Market: Recent Developments and Innovations

Figure 35: Europe Wide Bandgap Semiconductor Market: Partnerships, Collaborations, and Expansions

Figure 36: Europe Wide Bandgap Semiconductor Market: Mergers and Acquisitions

Figure 37: Europe Wide Bandgap Semiconductor Market: SWOT Analysis of Key Players

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