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Power Semiconductor Market Research Report- Forecast to 2030

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Description:

Global Power Semiconductor Market Overview:

Power Semiconductor Market Size was valued at USD 59.7 billion in 2021. The power semiconductor market industry is projected to grow from USD 63.4 billion in 2022 to USD 97.2 billion by 2030, exhibiting a compound annual growth rate (CAGR) of 6.30% during the forecast period (2022 - 2030). One of the primary market drivers that is producing a good outlook for the market growth is the automobile industry's rapid global expansion. Additionally, a number of technological developments, like as the use of x-by-wire or drive-by-wire technologies that help reduce vehicle weight, improve fuel efficiency, and reduce emissions, are boosting market growth.

Global Power Semiconductor Market Overview

Source: Secondary Research, Primary Research, MRFR Database, and Analyst Review

Power Semiconductor Market Trends

- #### Increasing demand for wireless communications and consumer electronics to propel the market growth

The global market is growing favorably due to the rising use of consumer electronics products. Today, a wide range of consumer products, including communication devices (such as smartphones, tablets, smartwatches, and other gadgets), computers (both personal and corporate computers use PCBs), entertainment systems, and home appliances, require semiconductors. The smartphone is the main user of semiconductors in this sector. The smartphone market has seen a lot of rivalry recently. Additionally, it is anticipated that increased mobile phone usage will fuel the global industry. For instance, Ericsson projects that by 2026, the amount of data used by smartphones worldwide would have increased from 32 exabytes per month in 2019. The Indian appliances and consumer electronics (ACE) industry is anticipated to grow at a 9% CAGR to reach INR 3.15 trillion (USD 48.37 billion) in 2022, according to the India Brand Equity Foundation (IBEF). Thus, this factor is driving the market CAGR.

Furthermore, along with the rising need for consumer electronics and wireless communications, factors including the rising need for battery-powered, energy-efficient portable gadgets are anticipated to fuel demand and have a beneficial effect on market expansion. Lithium-ion technology, the most dependable power source, powers consumer electronics. For these new batteries, a few limitations pose a challenge. In this sector, extending battery life has grown popular. Around the world, better methods are being explored to produce batteries that consume less energy. Manufacturers are driving this market expansion by increasing the battery capacity of their products, which increases consumer demand for faster charging times. Across all wearable and portable devices, the pattern has remained constant. Fast charging adapters are included right out of the box by manufacturers like OPPO, one plus, Motorola, Samsung, and Apple. Since they encourage their users to use their products less frequently when plugged in, fast charging is an essential part of their marketing efforts. During the projected period, it is expected that demand for energy-efficient battery technologies would increase.

However, power semiconductor adoption is anticipated to be fueled by a constant increase in non-conventional energy sources in the IT & consumer electronics, automotive, power distribution, and rail transportation sectors. The adoption of new consumer safety features and more effective power management is being driven by the car industry. SiC technology, for instance, is already being used in various low-power EV applications, including as battery chargers, auxiliary DC-DC converters, and solid-state circuit breakers. Currently, engineers can meet high voltage and power demands affordably thanks to more efficient drivetrains that use semiconductor technology like Silicon Carbide (SiC). As a result, these applications offer significant growth prospects. Thus, it is anticipated that this aspect will accelerate power semiconductor market revenue globally.

Power semiconductor Market Segment Insights:

Power Semiconductor Module Insights

The Power Semiconductor Market data, based on module, Power Modules and Power Discrete. The power discrete segment dominated the power semiconductor market revenue in 2021 and is projected to be the faster-growing segment during the forecast period, 2022-2030. One of the main consumers of discrete semiconductors is the smartphone. Since companies are creating smartphone chargers that could charge the device in a lot less time, the current rating for these has significantly increased. As a result, these semiconductors in the adapter play a crucial role in maintaining the necessary current and voltage levels.

Figure 2: Power Semiconductor Market by Module, 2021 & 2030 (USD Billion)
Power Semiconductor Market by Module, 2021 & 2030

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Power Semiconductor Application Insights

The Power Semiconductor Market segmentation has been segmented by application into Industrial, Automotive, Aerospace, Military and Consumer Electronics. The automotive segment dominated the market growth in 2021 and is projected to be the faster-growing segment during the forecast period, 2022-2030. With prices dropping and range increasing, electric vehicles are becoming more prevalent on the road today. Additionally, with prices falling and range increasing, electric vehicles are becoming more prevalent on the road today. The International Energy Agency estimates that 6.6 million plug-in electric light car sales will be made worldwide in 2021.

Power Semiconductor Component Insights

The Power Semiconductor Market segmentation, based on component, Rectifier, Diode and Thyristor. The diode segment dominated the power semiconductor market revenue in 2021 and is projected to be the faster-growing segment during the forecast period, 2022-2030. A diode is a two-terminal electrical component that only allows one direction of electric current flow. In many different applications, including power supplies, solar inverters, welding gear, uninterruptible power supplies, and others, diodes power semiconductors are frequently utilised.

Power Semiconductor Material Insights

The global power semiconductor industry, based on material, silicon carbide, Gan and silicon. The silicon carbide segment dominated the market in 2021 and is projected to be the faster-growing segment during the forecast period, 2022-2030. In terms of heat loss, switching speed, and size, silicon carbide (SiC) semiconductors are industry leaders. Reduced heat loss of 50% is achieved with the help of power electronics. This energy savings translates into more energy for the electric motor and better power electronics, which ultimately increases the battery range.

Power Semiconductor Regional Insights

By region, the study provides the market insights into North America, Europe, Asia-Pacific, and the Rest of the World. The Asia Pacific power semiconductor market accounted for USD 26.01 billion in 2021 and is expected to exhibit a 43.60% CAGR during the study period. It is anticipated that the Asia-Pacific region will dominate the market for power semiconductors due to its domination of the global semiconductor industry and the support of governmental laws. Approximately 65% of the global market for discrete semiconductors is made up of China, Japan, Taiwan, and South Korea.

Further, the major countries studied in the market report are: The U.S., Canada, Germany, France, the UK, Italy, Spain, China, Japan, India, Australia, South Korea, and Brazil.

Figure 3: Power Semiconductor Market SHARE BY REGION 2021 (%)
Power Semiconductor Market SHARE BY REGION 2021

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

North America power semiconductor market accounts for the fastest growing market share. The expansion of end-user industries like automotive, IT and telecommunications, military and aerospace, consumer electronics, and others is closely correlated with the growth of the power semiconductor market in North America. Moreover, US power semiconductor market held the largest market share, and the Canada power semiconductor market was the fastest-growing market in this region.

Europe power semiconductor market is expected to grow at a substantial CAGR from 2022 to 2030. The market is expanding due to the rising adoption of advanced technologies and semiconductors across numerous sectors. Many sectors focused on semiconductors have benefited from the increasing regional government involvement in research programme promotion, which is backed by a high-tech networking environment. Further, the UK power semiconductor market held the largest market share, and the Germany power semiconductor market was the fastest-growing market in the region.

Power Semiconductor Key Market Players & Competitive Insights

Major market players are spending a lot on R&D to increase their product lines, which will help the power semiconductor industry grow even more. Market participants are also taking various strategic initiatives to grow their worldwide footprint, including new product launches, contractual agreements, mergers and acquisitions, increased investments, market developments and collaboration with other organizations. Competitors in the industry must offer cost-effective items to expand and survive in an increasingly

competitive and rising market industry.

One of the primary business strategies manufacturers adopt in the global power semiconductor industry to benefit clients and expand the sector is manufacturing locally to reduce operating costs. In recent years, power semiconductor industry has provided medicine with some of the most significant benefits. The power semiconductor market major player such as Infineon, Vishay Intertechnology, Renesas Electronics, ON Semiconductor, Texas Instruments, Mitsubishi Electric Corporation, Littelfuse, Toshiba, Fuji Electric, Nexperia, Semekron and STMicroelectronics.

A global Japanese manufacturer of electronics and electrical equipment with its headquarters in Tokyo, Japan, Mitsubishi Electric Corporation was founded on January 15, 1921. It is one of Mitsubishi's primary businesses. In February 2022, the SLIMDIP-X power semiconductor module from Mitsubishi Electric Corporation, which offers low thermal resistance and noise for household appliance inverter systems, was recently released. The new SLIMDIPTM series module is intended to streamline and minimise the size of inverter systems used in appliances including refrigerators, washing machines, and air conditioners.

The Netherlands' Nijmegen is home to the headquarters of the semiconductor firm Nexperia. It is a division of the Chinese business Wingtech Technology, which is partly owned by the government. It has front-end plants in Greater Manchester, England, and Hamburg, Germany. In April 2021, the availability of Nexperia's second-generation 650 V GaN FETs, which support 80 PLUS Titanium-class power supply running at 2 kW and higher, was announced. In comparison to earlier technology and rival gadgets, it provides a significant performance boost.

Key companies in the power semiconductor market includes

- Infineon
- Vishay Intertechnology
- Renesas Electronics
- ON Semiconductor
- Texas Instruments
- Mitsubishi Electric Corporation
- Littelfuse
- Toshiba
- Fuji Electric
- Nexperia
- Semekron
- STMicroelectronics

Power Semiconductor Industry Developments

July 2023: A multi-year volume contract for the supply of the silicon-based electromobility chips has just been signed by Infineon Technologies AG and Semikron Danfoss. Semikron Danfoss will get chipsets from Infineon that include insulated gate bipolar transistors and diodes for use in power modules for inverters in electric cars. The need for power semiconductors is being driven by the explosive expansion of e-mobility. By 2028, two thirds of all new automobiles will have totally or mostly electric drivetrains, predict the partners, who have secured a crucial supply of semiconductors for that time period. The need for power semiconductors is being driven by the explosive expansion of e-mobility. By 2028, two thirds of all new automobiles will have totally or mostly electric drivetrains,

predict the partners that have secured a crucial supply of semiconductors for that time period.

March 2023: E-tronic, a supplier of electric vehicle power semiconductors & system solutions, recently announced the conclusion of its series A+ fundraising round, which raised tens of millions of yuan. Sinovention Ventures was the only investor, and the money would be used to build cutting-edge packaging facilities. The primary goal of E-tronic is to create SiC power modules of third-generation for EVs. The SiC motor controller that the business is currently developing provides high power density, higher efficiency, higher reliability, & high operating temperature.

July 2023: NoMIS Power, an Albany-based power semiconductor business, has signed a contract with the United States Air Force Research Laboratory, marking a highly significant accomplishment. Since a few years ago, the business, which was created as a spinoff from SUNY Polytechnic Institute, in fact has been attempting to market its product.

July 2023: Samsung Electronics has just recently declared its entry into the market for the next-generation power semiconductors after concentrating on the auto semiconductor business.

June 2021: A partnership between Vitesco Technologies and Infineon Technologies AG, a supplier of power semiconductors built of the cutting-edge material silicon carbide and a semiconductor manufacturer for vehicle electronics, has been established (SiC). Vitesco Technologies would experience rapid expansion as a result of the relationship in the semiconductor market.

April 2021: The BM6437x family of four new 600V IGBT Intelligent Power Modules (IPMs) from ROHM provide low noise and low loss properties that are perfect for power conversion in inverters. The components are utilised in residential appliances like air conditioners and washing machines as well as modest industrial equipment like robot motors with a small capacity.

Power Semiconductor Market Segmentation:

Power Semiconductor Module Outlook (USD Billion, 2018-2030)

- Power Modules
- Power Discrete

Power Semiconductor Application Outlook (USD Billion, 2018-2030)

- Industrial
- Automotive
- Aerospace
- Military
- Consumer Electronics

Power Semiconductor Component Outlook (USD Billion, 2018-2030)

- Rectifier
- Diode
- Thyristors

Power Semiconductor Material Outlook (USD Billion, 2018-2030)

- Silicon Carbide
- Gan
- Silicon

Power Semiconductor Regional Outlook (USD Billion, 2018-2030)

- North America
 - US
 - Canada
- Europe
 - Germany
 - France
 - UK
 - Italy
 - Spain
 - Rest of Europe
- Asia-Pacific
 - China
 - Japan
 - India
 - Australia
 - South Korea
 - Australia
 -

Rest of Asia-Pacific

- Rest of the World

- Middle East

- Africa

- Latin America

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