

Report Information

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Intelligent Power Module Market Research Report - Global Forecast till 2032

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Description:

Global Intelligent Power Module Market Overview:

The Intelligent Power Module Market size was valued at USD 1.5 billion in 2022. The intelligent power module industry is projected to grow from USD 1.64 Billion in 2023 to USD 3.33 billion by 2032, exhibiting a compound annual growth rate (CAGR) of 9.28% during the forecast period (2023-2032). The rising focus of the manufacturers on adopting energy-efficient technologies and growing awareness about energy conservation are the key market drivers expanding the market growth.

Intelligent Power Modules Market

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

Intelligent Power Module Market Trends

- **Surging global electric vehicle demand is driving the market growth**

Market CAGR for the automotive industry is in a period of unprecedented changes. The industry needs to make urgent progress in improving its environmental impact. The electrification of vehicle powertrains, ranging from the implementation of start/stop to full battery electric vehicles, is widely seen as how the global automotive industry can move closer toward the goal of true sustainability. Electric vehicles are the backbone of the low-pollution automotive sector; these vehicles can significantly reduce carbon dioxide content and compensate for the greenhouse effect to a certain extent. SAE International, a global association, has defined several vehicle electrification standards to help build safe and efficient electric vehicles. Isolation is critical to meet safety standards for storage batteries, communication networks, and power generation.

Prominent players in the manufacturing of intelligent power module are continuously focusing on integrating multiple functions in a single chip, which has resulted in complex designing issues. Special skillsets, robust methodologies, and toolsets are required to design and integrate complex devices. intelligent power module manufacturing companies provide multiple features in a single integrated circuit(IC), driving the intelligent power module market revenue.

For instance, in August 2022, Bourns entered the IGBT market by launching its first high-efficiency 600-V/650-V discrete products co-packaged with a fast recovery diode (FRD). The five new discrete devices in the Model BID series are said to be based on advanced Trench-Gate-Field-Stop technology, allowing better control over dynamic characteristics.

Additionally, the rising demand for renewable energy generation, OEM focus on providing creative and efficient energy and power monitoring modules, and increasing demand for intelligent power module in the automotive, industrial, and consumer electronics verticals are the major drivers driving the intelligent power module market. Furthermore, trends in the personal computing industry include faster processors, smaller system sizes, and the requirement to assist advanced applications, as intelligent power modules' small size effects in fewer parts needing to be purchased, stored, and put together.

Intelligent Power Module Market Segment Insights:

Intelligent Power Module Circuit Configuration Insights

The Intelligent Power Module Market segmentation, based on circuit configuration, includes 6-pack, 7-pack, Phase Bridge, and dual. The 6-pack segment dominated the market, accounting for the major market revenue over the forecast period. This is attributed to the highly compatible and adaptable nature of the 6-pack circuit configuration.

Intelligent Power Module Current Tracking Insights

The Intelligent Power Module Market segmentation, based on current tracking, includes Up to 100A, 101A-600A, and More than 600A. The up-to-100A category generated the most income over the forecast period. This is attributed to improving living standards worldwide, which have resulted in higher demand for consumer electronics and small household equipment.

Intelligent Power Module Voltage Insights

The Intelligent Power Module Market segmentation is based on voltage up to 600V, 601V to 1,200V, and more than 1,200V. The up-to-600V segment dominated the market, accounting for the major market revenue over the forecast period due to the expanding demand for consumer electronics.

Intelligent Power Module Verticals Insights

The Intelligent Power Module Market segmentation, based on verticals, includes consumer electronics, automotive, industrial, aerospace, defense, and others. The automotive category generated the most income over the forecast period. This is due to increased demand for power management chips in electronic applications such as refrigerators and air conditioners. A high power supply for diverse electric and electronic components is made possible by the intelligent power module, which is being used and integrated into the data center business.

Intelligent Power Module Power Devices Insights

The Intelligent Power Module Market segmentation, based on power devices, includes IGBT and MOSFET. The IGBT category generated the most income. This is due to increased demand for power management chips in electronic applications such as refrigerators and air conditioners.

Figure 1: Intelligent Power Module Market, by Power Devices, 2022 & 2032 (USD billion)

Intelligent Power Module Market, by Power Devices, 2022 & 2032

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

Intelligent Power Module Regional Insights

By Region, the study delivers market insights into North America, Europe, Asia-Pacific and Rest of the World. The Asia Pacific intelligent power module market area will dominate this market over the forecast period. The consumer electronics and automotive industries are expanding quickly in China, projected to raise demand for intelligent power modules in this region. Moreover, China intelligent power module market held the largest market share, and the Indian intelligent power module market was the fastest-growing market in the Asia-Pacific region.

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

Figure 2: GLOBAL WEIGHT LOSS MARKET SHARE BY REGION 2022 (%)

GLOBAL WEIGHT LOSS MARKET SHARE BY REGION 2022

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

Europe intelligent power module market accounts for the second-largest market share owing to the high utilization of renewable energy in end-user industries and more increased penetration of developed consumer electronic products, along with the growing EV usage. Further, the German intelligent power module market held the largest market share, and the UK intelligent power module market was the fastest-growing market in the European region.

The North America intelligent power module market is expected to grow at the fastest CAGR from 2023 to 2032. This is owing to the improved demand for intelligent power modules is greatly enhancing as electric and hybrid car adoption rates increase in the region. Moreover, China intelligent power module market held the largest market share, and the Indian intelligent power module market was the fastest-growing market in the North America region.

Intelligent Power Module Key Market Players & Competitive Insights

Leading market players are investing heavily in research and development to expand their product lines, which will help the intelligent power module market expand even more. Market participants are also undertaking several strategic activities to expand their global footprint, with important market developments including new product launches, contractual agreements, mergers and acquisitions, higher investments, and collaboration with other organizations. The intelligent power module industry must offer cost-effective items to expand and survive in a more competitive and rising market climate.

Manufacturing locally to minimize operational costs is one of the key business tactics manufacturers use in the global intelligent power module industry to benefit clients and increase the market sector. Major players in the intelligent power module market, including Mitsubishi Electric Corporation, Semiconductor Components Industries, LLC, Infineon Technologies AG, Fuji Electric Co., Ltd., and others, are attempting to extend market demand by investing in research and development operations.

STMicroelectronics designs develops, manufactures, and markets semiconductor integrated circuits and

discrete devices. The Company's products are used in the telecommunications, consumer electronics, automotive, computer, and industrial sectors. Geographically, customers are located in North America, Europe, and the Asia Pacific region. In December 2022, STMicroelectronics launched high-power modules for electric vehicles that boost performance and driving range. ST's new silicon-carbide (SiC) power modules have been selected for Hyundai's E-GMP electric-vehicle platform shared by KIA EV6 and several models.

Siemens Mobility GmbH operates as a railway company. The Company offers intelligent and efficient mobility solutions for urban, interurban, and freight transportation. Siemens Mobility serves clients worldwide. In May 2022, Siemens Mobility and Mitsubishi Electric Europe B.V. collaborated on SiC intelligent power module technology to allow efficient and sustainable mobility and electrical energy savings in the transportation sector.

Key Companies in the Intelligent Power Module market include

- STMicroelectronics NV (Switzerland)
- Infineon Technologies (Germany)
- ROHM Semiconductor (Japan)
- Mitsubishi Electric Corporation (Japan)
- Fuji Electric Co. Ltd (Japan)
- ON Semiconductor (US)
- Sanken Electric Co. Ltd. (Japan)
- Hon Hai Precision Industry Co. Ltd (Taiwan)

Intelligent Power Module Industry Developments

May 2022: Sensitron declares the SPG025N035P1B GaN Half Bridge Intelligent Power Module module, which employs Efficient Power Conversion's 350 V EPC2050 eGaN FET. Sensitron decreased the size of their solution by 60% by replacing typical silicon FETs with EPC's 350 V and EPC2050 GaN FET while also boosting the module's superb junction-to-case thermal conduction.

April 2022: Infineon Technologies launched a 600V, 15A intelligent power module for home appliances, focusing on drives for room air conditioners. The company's CIPOS Tiny IM323-L6G module is based on TRENCHSTOP IGBT RC-D2 transistors with an SOI gate driver technology and built-in diode to boost efficiency and reliability, reducing the cost and system size.

March 2022: Microchip Technology Inc. expanded its SiC portfolio by releasing the industry's lowest on-resistance [RDS 3.3 kV SiC MOSFETs and most elevated current-rated SiC SBDs available in the market, allowing designers to take advantage of reliability, ruggedness, and performance. With the growth of Microchip's SiC portfolio, developers are equipped with the devices to create lighter, smaller, and more efficient solutions for electrified transportation, aerospace, renewable energy, and industrial applications.

Intelligent Power Module Market Segmentation:

Intelligent Power Module Circuit Configuration Outlook

- 6-Pack
- 7-Pack
- Phase Bridge
- Dual

Intelligent Power Module Current Rating Outlook

- Up to 100A
- 101A-600A
- More than 600A

Intelligent Power Module Voltage Outlook

- Up to 600V
- 601V-1200V
- More than 1200V

Intelligent Power Module Power Devices Outlook

- IGBT
- MOSFET

Intelligent Power Module Verticals Outlook

- Consumer Electronics
- Automotive
- Industrial
- Aerospace
- Defense
- Others

Intelligent Power Module Regional Outlook

- 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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