



**Global and China IGBT Industry Report,
2019-2025**

May 2019

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

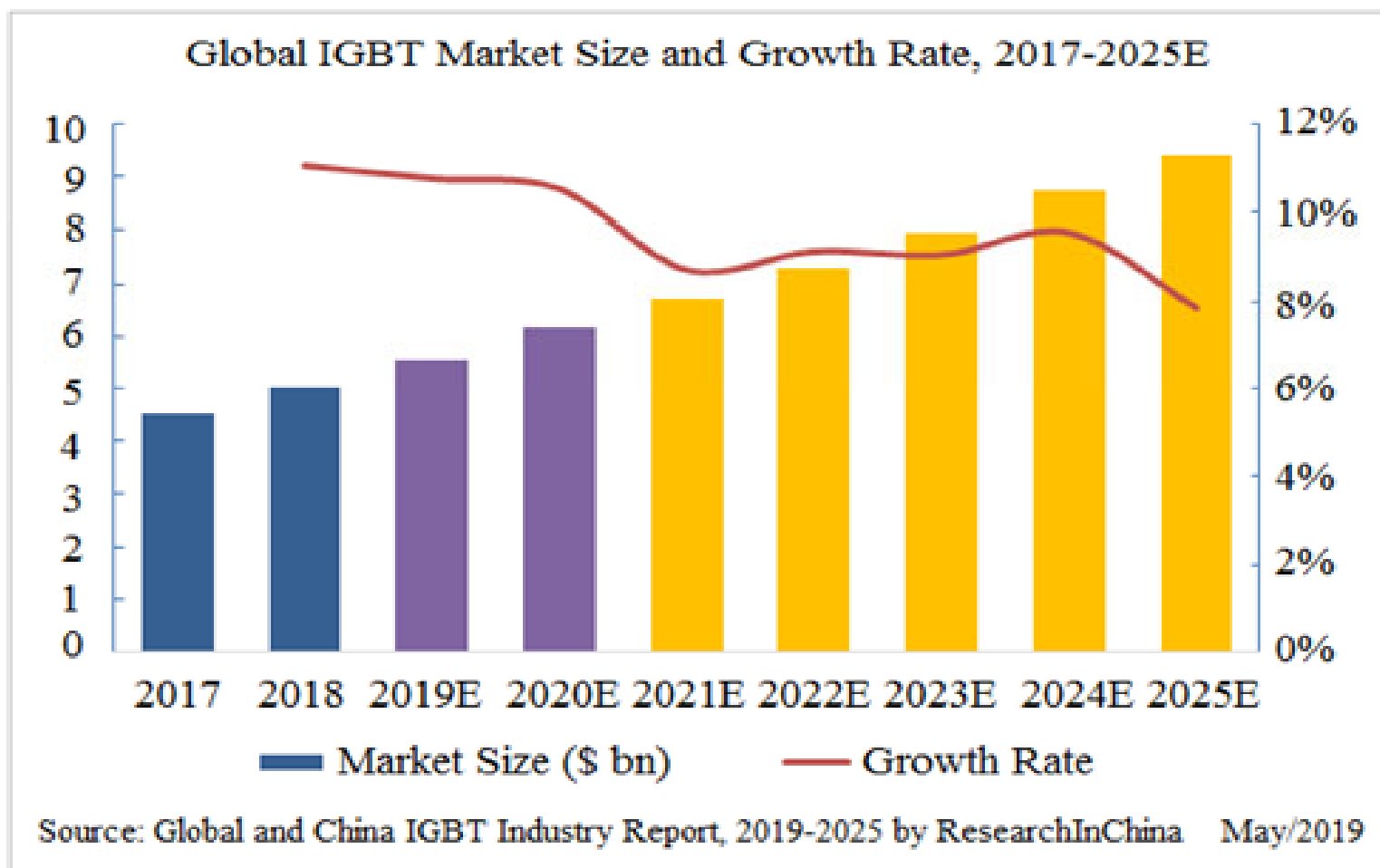
IGBT finds wide application in fields ranging from home appliances and digital products to aviation & aerospace and high-speed rails, so does in the emerging sectors like smart grid and new energy vehicle. IGBT industry is developing apace, with the market size reaching USD5.033 billion with a year-on-year increase of 9.1% in 2018 thanks to the burgeoning new energy vehicle worldwide. In future, IGBT industry will boom in the wake of the vigorous development of NEV, smart grid and rail transit, and it is estimated worth USD9.421 billion in 2025 with a CAGR of 9.4%.

Power semiconductor vendors mostly adopt IDM model featured with complete wafer foundries, chip factories and packaging houses. The tycoons like Infineon and On-Semi with IDM model have strong control ability over cost and quality. The power semiconductor vendors in Europe, America and Japan with IDM model are dedicated to high-end products. Also, the majority of vendors from Mainland China employ IDM model, but focus on low-end diode and low-voltage MOSFET. While Taiwanese peers take fabless model and are mostly engaged in chip fabrication and packaging.

Power semiconductor industry is characterized by high concentration since the world's top 10 vendors commanded 62.58% of the market in 2018. Infineon, the largest player, shared 19.87%. The power semiconductor market is firmly dominated by European, American and Japanese companies, where Chinese companies started late with backward technology. Currently, power semiconductor companies can be grouped into three echelons: the first is represented by European and American giants such as Infineon and On-Semi; the second echelon is comprised of Japanese companies like Mitsubishi and Fuji Electric; the third echelon refers to Chinese players including Hangzhou Silan Microelectronics and Nexperia, etc.

Global and China IGBT Industry Report, 2019-2025 covers the following:

IGBT and power semiconductor industry (definition, application, production process, technology roadmap and technical comparison);
IGBT downstream industries (PV power generation, wind power generation, industrial application, electric vehicle, charging piles, home appliances, rail transit, etc.);
Global and Chinese IGBT markets (market size, supply & demand, competition pattern and development trend);
21 global and Chinese IGBT vendors like Infineon, Fuji Electric, On-Semi and Mitsubishi (profile, operation, R&D, production bases and IGBT technology & business).



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