

## **India Automotive Power Electronics Market Outlook - Forecast Trends, Market Size, Share and Growth Analysis Report (2025-2034)**

Market Report | 2025-06-28 | 145 pages | EMR Inc.

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### **Report description:**

The India automotive power electronics market was valued at USD 11.98 Billion in 2024. The industry is expected to grow at a CAGR of 6.60% during the forecast period of 2025-2034. The growing acceptance of two- and three-wheeler electric vehicles in city and semi-urban locations have increasingly boosted the demand for compact and cost-efficient power electronics solutions, tailored to suit unique liquor mobility patterns and infrastructure. As a result, this trend has resulted in the market attaining a valuation of USD 22.70 Billion by 2034.

India Automotive Power Electronics Market Report Summary

Description

Value

Base Year

USD Billion

2024

Historical Period

USD Billion

2018-2024

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Forecast Period

USD Billion

2025-2034

Market Size 2024

USD Billion

11.98

Market Size 2034

USD Billion

22.70

CAGR 2018-2024

Percentage

XX%

CAGR 2025-2034

Percentage

6.60%

CAGR 2025-2034 - Market by Region

West and Central India

7.5%

CAGR 2025-2034 - Market by Region

North India

6.9%

CAGR 2025-2034 - Market by Vehicle Type

Electric Vehicles

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9.3%

#### CAGR 2025-2034 - Market by Application

Battery management

8.8%

#### 2024 Market Share by Region

North India

28.9%

#### India Automotive Power Electronics Market Overview

The India automotive power electronics market experiences tremendous growth due to the increased penetration of hybrid vehicles, stringent emission regulations, and a growing focus on vehicle electrification. Innovation in powertrain electronics and battery management systems is being propelled further by increased demand for fuel-efficient systems. Some of the trends influencing the market growth are the adoption of silicon carbide (SiC) and integration of AI into vehicle control units. Major players such as Tata Elxsi, Continental India, and Infineon Technologies are increasing their R&D efforts and focusing on alliances to meet changing requirements of OEMs. The market opportunity covers passenger vehicles, commercial EVs, and retrofitting solutions with long-term B2B growth potential.

#### India Automotive Power Electronics Market Growth

Telematics-integrated vehicle systems and retrofitting solutions for conventional vehicles are two niches driving heavy demand in the automotive power electronics market in India. Telematics integration in vehicles covering fleet management, predictive maintenance, and driver behavior monitoring require advanced power electronics, which is expected to support continuous data transmission and onboard processing. This is a key opportunity for component suppliers aiming towards connected mobility. On the other hand, retrofitting internal combustion engine (ICE) vehicles into electric ones has been gaining traction in the market, especially in the commercial and public transport space. This niche requires adaptable and scalable powertrain electronics, allowing suppliers to cater to the needs of a growing secondary EV conversion market across the country.

#### Key Trends and Recent Developments

The key trends of the India automotive power electronics market include the rise of SiC semiconductors, integration of Battery Management Systems (BMS), electrification of commercial vehicles, and shift towards modular power electronics architecture.

#### March 2025

RIR Power Electronics announced plans to develop India's first Silicon Carbide (SiC) Semiconductor production facility in Odisha, with phase 1 production of Epitaxy Wafers slated to begin in December 2025. This strategic investment of Rs 618 Crores to build high power SiC devices is a milestone in expanding India's semiconductor industry and improving domestic manufacturing capabilities under the Make in India initiative.

#### February 2025

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Turntide made its debut in India with a comprehensive range of low and high-voltage power electronics series, as well as innovative axial flux motors, at the Bharat Mobility Global Expo 2025. The stunning presentation of India's thriving mobility sector featured over 1,500 exhibitors and drew nearly one million visitors.

January 2025

Turntide Technologies announced the launch of its low and high-voltage power electronics line, as well as its innovative axial flux motors, to meet India's growing demand for sustainable mobility. The Gen 4 inverter series offers a small and adaptable solution for low-voltage applications (48 V to 80 V), making it perfect for two- and three-wheelers.

December 2024

Valeo and ROHM Semiconductor announced a plan to collaborate and optimize the next generation of power modules for electric motor inverters, leveraging their combined power electronics management experience. As a first step, ROHM will provide Valeo with its TRCDRIVE pack, a 2-in-1 Silicon Carbide (SiC) molded module for future powertrain solutions.

Rise of Silicon Carbide (SiC) Semiconductors

The SiC semiconductors in EV powertrains are being increasingly preferred by Indian OEMs due to their improved performance in terms of efficiency, thermal conductivity, and space, boosting the overall demand in the India automotive power electronics market. Inverters and chargers based on SiC ensure extended ranges and performance of the vehicle. Companies like Infineon and Bharat Electronics Ltd are helping develop SiC modules for automotive applications. The trend complements the advent of lightweight and efficient designs for EVs and opens new avenues for companies to develop and supply next-gen power modules to OEM and system integrators.

Integration of Battery Management Systems (BMS)

Battery Management Systems (BMS) are fast becoming the center of electric vehicles, ensuring safety and longevity of the battery while optimizing performance. This trend has significantly accelerated the India automotive power electronics market growth. Automotive companies are collaborating with power electronics companies to develop smart BMS with real-time monitoring and thermal control. Exicom and Delta Electronics lead the way with BMS-related solutions based on Indian conditions. This trend is critical in scaling two-wheelers and four-wheeler EVs and offers B2B players a developing niche in supplying advanced battery control technologies.

Electrification of Commercial Vehicles

As per the India automotive power electronics market analysis, the electrification of commercial vehicles (CVs) such as buses, delivery vans, and trucks, is instantaneously advancing the demand for heavy-duty power electronics. Companies such as Ashok Leyland and Olectra Greentech have launched electric buses equipped with advanced-level inverters and motor controllers. This trend demands rugged and scalable power solutions to handle high power loads. B2B firms supplying industrial-grade power control units and thermal management systems are positioned well enough to gain from this commercial EV push.

Shift Towards Modular Power Electronics Architecture

Automotive manufacturers are ushering modular, scalable electronic systems to provide platform standardization and fast product development, reshaping the entire India automotive power electronics market dynamics. Modular inverter architecture and

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converter architecture allow reuse across many vehicle models. Tata Motors, for instance, is investing in flexible EV platforms that require such adaptable power solutions. This trend assists mass customization while creating an opportunity for B2B vendors to build standard-compliant power electronic subsystems.

#### India Automotive Power Electronics Market Trends

Growing demand from consumers for sophisticated safety features in vehicles is a key driver for the India automotive power electronics market expansion. The market observes that Indian buyers are increasingly seeking vehicles equipped with safety features like electronic stability control, ABS, and adaptive cruise control. This trend to some extent drives a growing demand for precision power electronics support for such systems. This market growth is further supported by the government focus on developing smart cities. The emerging smart city initiative has led to the adoption of connected and electric mobility solutions, thus engendering the integration of intelligent power management systems within vehicles. This has created the need for high-performance energy-efficient automotive electronics.

#### India Automotive Power Electronics Market Opportunities

Two chief opportunities in the India automotive power electronics market include localizing semiconductor supply chains and a growth in EV charging infrastructure. With the high global chip shortage and import dependence, Indian firms have a good chance at collaborating with local players in the fabrication, packaging, and testing of automotive-grade chips. Parallely, the expansion of public and private EV charging networks is stimulating the need for grid-interfaced high-efficiency power converters and control systems, offering firms the chance to provide key elements for quick-charging stations and vehicle-to-grid capabilities.

#### India Automotive Power Electronics Market Restraints

□ The cost of high-end materials, like silicon carbide (SiC) and gallium nitride (GaN) semiconductor, might limit any dip in the costs of power electronics for mass market cars. Hence, this factor poses a serious challenge to the India automotive power electronics market growth.

□ Inconsistent EV charging facilities across the country is another big challenge for greater uptake of EVs. This hinders the demand for supporting devices of power electronics pertaining such as chargers and power management system, particularly within the rural and semi-urban areas.

#### India Automotive Power Electronics Industry Segmentation

The EMR's report titled "India Automotive Power Electronics Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

##### Market Breakup by Device Type

- Power IC
- Module & Discrete

##### Market Breakup by Application

- ADAS & safety
- Body control & comfort
- Infotainment
- Telematics

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- Engine management & powertrain
- Battery management

#### Market Breakup by Component

- Microcontroller
- Sensor

#### Market Breakup by Material

- Silicon
- Silicon Carbide
- Gallium Nitride
- Others

#### Market Breakup by Vehicle Type

- Passenger Vehicle
- Light Commercial Vehicle
- Heavy Commercial Vehicle
- Electric Vehicles

#### Market Breakup by Region

- North India
- East India
- South India
- West and Central India

#### India Automotive Power Electronics Market Share

##### Market Analysis by Device Type

The compact size, integrated technology, and smart feature control such as battery monitoring, motor control, and infotainment systems make power ICs popular as per the India automotive power electronics market shares. Power ICs are increasingly being used in two-wheelers and compact EVs where they can be traded against cost and space. On the other hand, module and discrete devices are drawing increased attention in high-power applications such as inverters, converters, and onboard chargers for electric buses and four-wheelers. Their ruggedness adds to the efficiency of thermal management and high-voltage systems, making them crucial for the advancement of EVs and hybrid vehicles in India.

##### Market Analysis by Application

Growth in the India automotive power electronics market is being driven by battery management & engine/powertrain systems, due to increased adoption of EVs and stringent norms for fuel efficiency. The battery management application is expected to grow at a CAGR of 8.8% over the forecast period. ADAS & safety features are gaining momentum in premium and mid-range vehicles, while the body-control & comfort runs segment expand due to increased consumer expectations. Infotainment and telematics are also growing rapidly due to demands for connectivity, navigation, and vehicle tracking, especially in regard to commercial fleets.

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These applications, collectively, are inducing OEMs to integrate into more sophisticated power electronic components in their products, covering all vehicle segments.

#### Market Insights by Component

Microcontrollers have increasingly stimulated the India automotive power electronics market value as they act as the key components for powertrain control, battery management, and smart-driving features. Their significance in enabling these functions is rendering real-time decision-making and energy optimizations pertinent for EVs and hybrid vehicles. In contrast, sensors are also in great demand for ADAS, thermal management certifications, and predictive maintenance systems. Both components are becoming more important for electric power delivery, functional safety, and efficiency throughout both passenger and commercial vehicle applications as the market progresses toward connected and automated vehicles.

#### Market Analysis by Material

Cost-effective and widely used in legacy systems, silicon continues to dominate the India automotive power electronics market. Silicon Carbide (SiC) is quickly becoming popular in the market due to its efficiency, thermal conductivity, and high-power applications, concerning the illustrious electric vehicles (EVs) and fast-charging infrastructure. Gallium Nitride (GaN) has gained traction due to high-frequency applications that result in better performance for lighter and more compact designs in power conversion systems.

#### Market Analysis by Vehicle Type

Passenger cars propel automotive power electronics demand in India, particularly with the emergence of EVs and connected car technologies. The growing adoption of electric powertrains in light commercial vehicles (LCVs) has sped up power electronics efficiency demand. Heavy commercial vehicles (HCVs) are also embracing more advanced power systems to enhance fuel efficiency and manage emissions. Electric vehicles (EVs), specifically two-wheelers and buses, are the highest revenue growth segment, requiring next-generation power electronics for battery control, inverters, and charging, thus enabling a widespread adoption by segments.

#### India Automotive Power Electronics Market Regional Analysis

##### CAGR 2025-2034 - Market by

##### Region

##### West and Central India

7.5%

##### North India

6.9%

##### East India

XX%

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South India

XX%

#### North India Automotive Power Electronics Market Opportunities

The growing automobile manufacturing hub in Haryana, Uttar Pradesh, and Delhi, is fueling the overall demand for automotive power electronics in North India. The market is expected to grow at CAGR of 6.9% over the forecast period. The presence of leading original equipment manufacturers (OEMs), electric vehicle (EV) entrepreneurs, and supportive government policies regarding electric mobility, including EV production clusters, has led to an increased adoption in this region.

#### East India Automotive Power Electronics Market Insights

Represented by states such as West Bengal, Odisha and Jharkhand, the East India automotive power electronics market is experiencing a gradual adoption with public transport electrification or electric buses. Greater green transportation and infrastructure growth highlight the importance of sophisticated powertrain solutions and charging stations in this region.

#### South India Automotive Power Electronics Market Growth

The South India automotive power electronics market is growing as the region is an important automotive hub, with OEMs like Hyundai, Tata Motors, and Bosch in states like Tamil Nadu, Karnataka, and Andhra Pradesh. Being part of extreme automobile production, the government has formulated various EV production incentives, and the manufacturing strength has made the region prioritize power electronics development.

#### West and Central India Automotive Power Electronics Market Outlook

The West and Central India region, mainly Maharashtra and Gujarat, as well as Madhya Pradesh, is currently undergoing a major demand for automotive power electronics. The existing strong industrial infrastructure and manufacturing capacity have facilitated this growth. Maharashtra's policies are geared toward EV adoption, whereas Gujarat is emerging as a manufacturing hub with development toward cleaner technologies, prompting demand for advanced power systems. In addition, increasing dependence on sustainable solutions in commercial vehicle fleets, particularly in Gujarat, is also contributing to the increasing power electronics requirements in the region.

#### Competitive Landscape

The India automotive power electronics market players are looking to expand their portfolios into advanced EV components, augmenting energy efficiency, and harnessing local manufacturing opportunities. Most of the India automotive power electronics companies have focused on innovations in power management systems and high-performance semiconductors, along with strategic partnerships, to seize the growing demand for electric vehicles and smart mobility solutions.

#### NXP Semiconductors

NXP Semiconductors, established in 1953, is one of the chief players in automotive power electronics domain with a particular focus on microcontrollers, power ICs, and sensors. NXP supports EV and ADAS progress by providing safety, energy efficiency, and connectivity to the growing automotive industry in India.

#### Robert Bosch GmbH

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Founded in 1886 in Stuttgart, Germany, Robert Bosch GmbH designs cutting-edge automotive power electronics with electrification, powertrain control, and sophisticated safety solutions. Bosch assumes a leading role in driving EV adoption in India and automotive electronics integration for OEMs through solutions that enable fulfillment of energy efficiency and performance needs.

Infineon Technologies AG

Infineon Technologies AG, established in 1999 with headquarters in Germany, dominates the automotive power electronics sector by offering cutting-edge solutions in power semiconductors, energy management, and automotive sensors. Heading 4: Mitsubishi Electric Corporation

Other key players in the India automotive power electronics market report are Renesas Electronics Corporation, Denso Corporation, BorgWarner Inc., Semiconductor Components Industries, LLC, and Danfoss A/S, among others.

## **Table of Contents:**

- 1 Executive Summary
  - 1.1 Market Size 2024-2025
  - 1.2 Market Growth 2025(F)-2034(F)
  - 1.3 Key Demand Drivers
  - 1.4 Key Players and Competitive Structure
  - 1.5 Industry Best Practices
  - 1.6 Recent Trends and Developments
  - 1.7 Industry Outlook
- 2 Market Overview and Stakeholder Insights
  - 2.1 Market Trends
  - 2.2 Key Verticals
  - 2.3 Key Regions/Countries
  - 2.4 Supplier Power
  - 2.5 Buyer Power
  - 2.6 Key Market Opportunities and Risks
  - 2.7 Key Initiatives by Stakeholders
- 3 Economic Summary
  - 3.1 GDP Outlook
  - 3.2 GDP Per Capita Growth
  - 3.3 Inflation Trends
  - 3.4 Democracy Index
  - 3.5 Gross Public Debt Ratios
  - 3.6 Balance of Payment (BoP) Position
  - 3.7 Population Outlook
  - 3.8 Urbanisation Trends
- 4 Country Risk Profiles
  - 4.1 Country Risk
  - 4.2 Business Climate
- 5 Asia Pacific Automotive Power Electronics Market Overview

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- 5.1 Key Industry Highlights
- 5.2 Asia Pacific Automotive Power Electronics Historical Market (2018-2024)
- 5.3 Asia Pacific Automotive Power Electronics Market Forecast (2025-2034)
- 6 India Automotive Power Electronics Market Analysis
  - 6.1 Key Industry Highlights
  - 6.2 India Automotive Power Electronics Historical Market (2018-2024)
  - 6.3 India Automotive Power Electronics Market Forecast (2025-2034)
  - 6.4 India Automotive Power Electronics Market by Device Type
    - 6.4.1 Power IC
      - 6.4.1.1 Historical Trend (2018-2024)
      - 6.4.1.2 Forecast Trend (2025-2034)
    - 6.4.2 Module & Discrete
      - 6.4.2.1 Historical Trend (2018-2024)
      - 6.4.2.2 Forecast Trend (2025-2034)
  - 6.5 India Automotive Power Electronics Market by Application
    - 6.5.1 ADAS & safety
      - 6.5.1.1 Historical Trend (2018-2024)
      - 6.5.1.2 Forecast Trend (2025-2034)
    - 6.5.2 Body control & comfort
      - 6.5.2.1 Historical Trend (2018-2024)
      - 6.5.2.2 Forecast Trend (2025-2034)
    - 6.5.3 Infotainment
      - 6.5.3.1 Historical Trend (2018-2024)
      - 6.5.3.2 Forecast Trend (2025-2034)
    - 6.5.4 Telematics
      - 6.5.4.1 Historical Trend (2018-2024)
      - 6.5.4.2 Forecast Trend (2025-2034)
    - 6.5.5 Engine management & powertrain
      - 6.5.5.1 Historical Trend (2018-2024)
      - 6.5.5.2 Forecast Trend (2025-2034)
    - 6.5.6 Battery management
      - 6.5.6.1 Historical Trend (2018-2024)
      - 6.5.6.2 Forecast Trend (2025-2034)
  - 6.6 India Automotive Power Electronics Market by Component
    - 6.6.1 Microcontroller
      - 6.6.1.1 Historical Trend (2018-2024)
      - 6.6.1.2 Forecast Trend (2025-2034)
    - 6.6.2 Sensor
      - 6.6.2.1 Historical Trend (2018-2024)
      - 6.6.2.2 Forecast Trend (2025-2034)
  - 6.7 India Automotive Power Electronics Market by Material
    - 6.7.1 Silicon
      - 6.7.1.1 Historical Trend (2018-2024)
      - 6.7.1.2 Forecast Trend (2025-2034)
    - 6.7.2 Silicon Carbide
      - 6.7.2.1 Historical Trend (2018-2024)
      - 6.7.2.2 Forecast Trend (2025-2034)

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- 6.7.3 Gallium Nitride
  - 6.7.3.1 Historical Trend (2018-2024)
  - 6.7.3.2 Forecast Trend (2025-2034)
- 6.7.4 Others
  - 6.7.4.1 Historical Trend (2018-2024)
  - 6.7.4.2 Forecast Trend (2025-2034)
- 6.8 India Automotive Power Electronics Market by Vehicle Type
  - 6.8.1 Passenger Vehicle
    - 6.8.1.1 Historical Trend (2018-2024)
    - 6.8.1.2 Forecast Trend (2025-2034)
  - 6.8.2 Light Commercial Vehicle
    - 6.8.2.1 Historical Trend (2018-2024)
    - 6.8.2.2 Forecast Trend (2025-2034)
  - 6.8.3 Heavy Commercial Vehicle
    - 6.8.3.1 Historical Trend (2018-2024)
    - 6.8.3.2 Forecast Trend (2025-2034)
  - 6.8.4 Electric Vehicles
    - 6.8.4.1 Historical Trend (2018-2024)
    - 6.8.4.2 Forecast Trend (2025-2034)
- 6.9 India Automotive Power Electronics Market by Region
  - 6.9.1 North India
    - 6.9.1.1 Historical Trend (2018-2024)
    - 6.9.1.2 Forecast Trend (2025-2034)
  - 6.9.2 East India
    - 6.9.2.1 Historical Trend (2018-2024)
    - 6.9.2.2 Forecast Trend (2025-2034)
  - 6.9.3 South India
    - 6.9.3.1 Historical Trend (2018-2024)
    - 6.9.3.2 Forecast Trend (2025-2034)
  - 6.9.4 West and Central India
    - 6.9.4.1 Historical Trend (2018-2024)
    - 6.9.4.2 Forecast Trend (2025-2034)
- 7 Market Dynamics
  - 7.1 SWOT Analysis
    - 7.1.1 Strengths
    - 7.1.2 Weaknesses
    - 7.1.3 Opportunities
    - 7.1.4 Threats
  - 7.2 Porter's Five Forces Analysis
    - 7.2.1 Supplier's Power
    - 7.2.2 Buyer's Power
    - 7.2.3 Threat of New Entrants
    - 7.2.4 Degree of Rivalry
    - 7.2.5 Threat of Substitutes
  - 7.3 Key Indicators of Demand
  - 7.4 Key Indicators of Price
- 8 Value Chain Analysis

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- 8.1 Key Stakeholders
- 8.2 Stages in the Value Chain
- 9 Competitive Landscape
  - 9.1 Supplier Selection
  - 9.2 Key Global Players
  - 9.3 Key Local Players
  - 9.4 Key Player Strategies
  - 9.5 Company Profile
    - 9.5.1 NXP Semiconductors
      - 9.5.1.1 Company Overview
      - 9.5.1.2 Product Portfolio
      - 9.5.1.3 Demographic Reach and Achievements
      - 9.5.1.4 Certifications
    - 9.5.2 Robert Bosch GmbH
      - 9.5.2.1 Company Overview
      - 9.5.2.2 Product Portfolio
      - 9.5.2.3 Demographic Reach and Achievements
      - 9.5.2.4 Certifications
    - 9.5.3 Infineon Technologies AG
      - 9.5.3.1 Company Overview
      - 9.5.3.2 Product Portfolio
      - 9.5.3.3 Demographic Reach and Achievements
      - 9.5.3.4 Certifications
    - 9.5.4 Mitsubishi Electric Corporation
      - 9.5.4.1 Company Overview
      - 9.5.4.2 Product Portfolio
      - 9.5.4.3 Demographic Reach and Achievements
      - 9.5.4.4 Certifications
    - 9.5.5 Renesas Electronics Corporation
      - 9.5.5.1 Company Overview
      - 9.5.5.2 Product Portfolio
      - 9.5.5.3 Demographic Reach and Achievements
      - 9.5.5.4 Certifications
    - 9.5.6 Denso Corporation
      - 9.5.6.1 Company Overview
      - 9.5.6.2 Product Portfolio
      - 9.5.6.3 Demographic Reach and Achievements
      - 9.5.6.4 Certifications
    - 9.5.7 BorgWarner Inc.
      - 9.5.7.1 Company Overview
      - 9.5.7.2 Product Portfolio
      - 9.5.7.3 Demographic Reach and Achievements
      - 9.5.7.4 Certifications
    - 9.5.8 Semiconductor Components Industries, LLC.
      - 9.5.8.1 Company Overview
      - 9.5.8.2 Product Portfolio
      - 9.5.8.3 Demographic Reach and Achievements

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- 9.5.8.4 Certifications
- 9.5.9 Danfoss A/S
  - 9.5.9.1 Company Overview
  - 9.5.9.2 Product Portfolio
  - 9.5.9.3 Demographic Reach and Achievements
  - 9.5.9.4 Certifications
- 9.5.10 Others

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