

Global 800V Solid-State Transformer (SST) Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global 800V Solid-State Transformer (SST) market size was valued at US\$ 62.79 million in 2025 and is forecast to a readjusted size of US\$ 1122 million by 2032 with a CAGR of 35.5% during review period.

An 800V Solid-State Transformer (SST) is a power-electronic transformer system designed to convert medium-voltage AC or other grid-side power into an 800V DC bus, while providing galvanic isolation, voltage regulation, bidirectional power flow, and digital power control. Compared with conventional transformer-plus-rectifier architectures, an 800V SST can reduce conversion stages and support compact, high-power DC distribution. It is mainly associated with AI data centers, high-density computing, EV fast charging, battery energy storage, microgrids, and DC-native power systems. In data centers, 800VDC is being promoted to reduce current, copper usage, and distribution losses.

Global production capacity is approximately 100 MW.

In 2025, global sales reached approximately 73 MW, with an average price of around US\$ 834 per kw, gross margin around 38%.

The 800V SST market is an emerging high-value segment within solid-state transformer and DC power distribution technology. Its strongest near-term opportunities are in AI data centers and high-power EV charging, where high power density, reduced copper usage, fewer conversion stages, and bidirectional energy management are increasingly important. However, the market is still at an early stage and faces challenges such as

high cost, reliability validation, medium-voltage safety, DC protection, thermal design, and standardization. In the long term, as AI infrastructure, EV charging, energy storage, and DC grids expand, 800V SSTs are expected to become an important enabling technology.

Market Trend

The 800V SST market is moving from research and demonstration toward early commercial positioning, especially in AI data center power architecture and high-power EV charging. The key trend is the shift from traditional low-voltage AC distribution to medium-voltage input and 800VDC output systems. NVIDIA has promoted 800VDC distribution for next-generation AI factories, while Eaton-related research has discussed medium-voltage SSTs for data center power distribution with 800VDC output. Wide-bandgap semiconductors such as SiC and GaN are becoming important because they enable higher switching frequency, smaller magnetic components, higher efficiency, and greater power density.

Market Drive

The main drivers of the 800V SST market are the rapid growth of AI data centers, high-density server racks, EV fast charging, and DC distribution systems. As rack power rises, traditional 48V/54V or 400V-class architectures face higher current, cable loss, copper cost, and thermal management pressure. 800VDC distribution can reduce current and improve power delivery efficiency, making it attractive for large-scale computing infrastructure. In EV charging, SST-based 800V DC charging systems can connect more directly to medium-voltage grids and reduce the number of conversion stages. These advantages support long-term demand for 800V SST solutions.

Upstream and Downstream

The upstream supply chain of 800V SST includes SiC and GaN power semiconductor suppliers, power module manufacturers, gate driver providers, high-frequency transformer suppliers, magnetic core producers, capacitor suppliers, sensor companies, cooling system suppliers, PCB manufacturers, protection-device suppliers, and digital control software developers. Key technologies include medium-voltage power conversion, high-frequency isolation, insulation design, thermal management, fast fault protection, and bidirectional control. Downstream customers mainly include AI data center operators, cloud service providers, EV charging infrastructure operators, battery storage integrators, utilities, microgrid developers, and industrial power users.

Commercialization depends on cooperation among semiconductor companies, transformer manufacturers, power electronics firms, and end users.

This report is a detailed and comprehensive analysis for global 800V Solid-State Transformer (SST) market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global 800V Solid-State Transformer (SST) market size and forecasts, in consumption value (\$ Million), sales quantity (MW), and average selling prices (USD/KW), 2021-2032

Global 800V Solid-State Transformer (SST) market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (MW), and average selling prices (USD/KW), 2021-2032

Global 800V Solid-State Transformer (SST) market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (MW), and average selling prices (USD/KW), 2021-2032

Global 800V Solid-State Transformer (SST) market shares of main players, shipments in revenue (\$ Million), sales quantity (MW), and ASP (USD/KW), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for 800V Solid-State Transformer (SST)

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global 800V Solid-State Transformer (SST)

market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Delta, Eaton, Amperesand, WG Energy, Sifang Automation, DG Matrix, China XD Electric, SolarEdge Technologies, Jinpan Smart Technology, Heron Power, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

800V Solid-State Transformer (SST) market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Single-stage SST

Multi-stage SST

Market segment by Power

Low-power SST

High-power SST

Market segment by Phase

Single-phase SST

Three-phase SST

Market segment by Application

Data Centers

Smart Grids

Others

Major players covered

Delta

Eaton

Amperesand

WG Energy

Sifang Automation

DG Matrix

China XD Electric

SolarEdge Technologies

Jinpan Smart Technology

Heron Power

Novos Power

Navitas Semiconductor

Infinity Flow

Hitachi Energy

Jiangsu Huachen Transformer

Sungrow Power

Newonder Special Electric

Kehua Data

Shenghong New Energy Equipment

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe 800V Solid-State Transformer (SST) product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of 800V Solid-State Transformer (SST), with price, sales quantity, revenue, and global market share of 800V Solid-State Transformer (SST) from 2021 to 2026.

Chapter 3, the 800V Solid-State Transformer (SST) competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the 800V Solid-State Transformer (SST) breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and 800V Solid-State Transformer (SST) market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of 800V Solid-State Transformer (SST).

Chapter 14 and 15, to describe 800V Solid-State Transformer (SST) sales channel, distributors, customers, research findings and conclusion.

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