

Global 800V Solid-State Transformer (SST) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global 800V Solid-State Transformer (SST) market size is expected to reach \$ 1122 million by 2032, rising at a market growth of 35.5% CAGR during the forecast period (2026-2032).

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 studies the global 800V Solid-State Transformer (SST) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for 800V Solid-State Transformer (SST) and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of 800V Solid-State Transformer (SST) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global 800V Solid-State Transformer (SST) total production and demand, 2021-2032, (MW)

Global 800V Solid-State Transformer (SST) total production value, 2021-2032, (USD Million)

Global 800V Solid-State Transformer (SST) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (MW), (based on production site)

Global 800V Solid-State Transformer (SST) consumption by region & country, CAGR, 2021-2032 & (MW)

U.S. VS China: 800V Solid-State Transformer (SST) domestic production, consumption, key domestic manufacturers and share

Global 800V Solid-State Transformer (SST) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (MW)

Global 800V Solid-State Transformer (SST) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (MW)

Global 800V Solid-State Transformer (SST) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (MW)

This report profiles key players in the global 800V Solid-State Transformer (SST) market based on the following parameters - company overview, production, value, 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.

Stakeholders would have ease in decision-making through various strategy matrices

used in analyzing the World 800V Solid-State Transformer (SST) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (MW) and average price (USD/KW) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global 800V Solid-State Transformer (SST) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global 800V Solid-State Transformer (SST) Market, Segmentation by Type:

Single-stage SST

Multi-stage SST

Global 800V Solid-State Transformer (SST) Market, Segmentation by Power:

Low-power SST

High-power SST

Global 800V Solid-State Transformer (SST) Market, Segmentation by Phase:

Single-phase SST

Three-phase SST

Global 800V Solid-State Transformer (SST) Market, Segmentation by Application:

Data Centers

Smart Grids

Others

Companies Profiled:

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

Key Questions Answered:

1. How big is the global 800V Solid-State Transformer (SST) market?
2. What is the demand of the global 800V Solid-State Transformer (SST) market?
3. What is the year over year growth of the global 800V Solid-State Transformer (SST) market?
4. What is the production and production value of the global 800V Solid-State Transformer (SST) market?
5. Who are the key producers in the global 800V Solid-State Transformer (SST) market?
6. What are the growth factors driving the market demand?

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