

Global AI Server Power Supply Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global AI Server Power Supply market size is expected to reach \$ 7819 million by 2032, rising at a market growth of 20.1% CAGR during the forecast period (2026-2032).

In 2025, global AI Server Power Supply capacity 4,200 k Units, sales reached approximately 4,130 k Units, with an average market price of around 517 USD/Unit, industrial gross margin 31%.

AI server AC-DC power supplies are rapidly evolving from a generic infrastructure component into a strategic bottleneck for AI data centers. Compared with traditional server PSUs, AI Server Power Supply must support far higher rack power, highly dynamic GPU workloads, and compliance with new standards such as OCP ORV3. The competitive landscape is led by Taiwanese ODMs and global power specialists—Delta, Lite-On, AcBel together with OmniOn Power, Advanced Energy—plus rising Chinese vendors focused on AI racks, all centered on 3–5.5 kW CRPS/ORV3 modules and 33 kW rack power shelves.

From a technology standpoint, AI Server Power Supply typically features wide-range single-phase or three-phase AC inputs and 48–54 V DC bus outputs. Multi-stage topologies (PFC plus high-frequency LLC or similar) push system efficiency toward titanium levels, with several 3–12 kW reference PSUs already demonstrating peak efficiencies around 97.5–98% at 230 VAC including fan power. Power ratings are migrating from legacy 3 kW units to 5.5 kW and beyond, while power density targets above 100 W/in² are accelerating the adoption of SiC and GaN devices in combination with advanced silicon MOSFETs. Digital control, PMBus telemetry, hot-swap, and N+1 redundancy are standard, enabling AI racks drawing tens of kilowatts to ride through extreme transient loads without compromising stability.

On the application side, AI Server Power Supply now sits at the heart of rack-level power architectures rather than acting as a simple pluggable PSU. In ORV3-type 21-inch racks, a typical 33 kW power shelf combines six hot-swappable 5.5 kW modules feeding a 48–50 V busbar, which in turn supplies multiple GPU server nodes and cascaded 48-to-12 V converters and point-of-load VRs. This architecture underpins hyperscale AI training clusters and is rapidly expanding into HPC, quantitative finance, large-scale simulation and other high-density workloads. Some vendors bundle AI server AC-DC power shelves with rack-level DC distribution, liquid-cooling manifolds and integrated monitoring, turning the power train into a solution-level differentiator in major tenders for AI data center builds.

Across the value chain, upstream suppliers provide power semiconductors, magnetics and long-life capacitors; midstream players design and manufacture AI Server Power Supply modules and rack systems; downstream customers are server OEMs and hyperscale/enterprise data center operators. Midstream consolidation is reshaping the competitive field. A notable example is AcBel's acquisition of ABB's Power Conversion division—now operating as OmniOn Power—which brought telecom-grade rectifiers, DC power systems and strong North American data center relationships into AcBel's portfolio. This deal effectively combines high-volume ODM manufacturing strengths with mission-critical front-end power expertise, enhancing the industry's ability to deliver robust AI-class AC-DC power and end-to-end rack-level DC systems.

Looking ahead, three structural shifts will define the AI Server Power Supply market. First, 48 V rack architectures are becoming the default for high-power AI systems, displacing 12 V distribution by cutting current, reducing copper losses and freeing cable and connector headroom for higher compute density. Second, unit power and efficiency are moving up in lockstep: the industry is transitioning from 3–5.5 kW PSUs toward 8–12 kW and beyond, enabled by GaN and SiC devices that support higher switching frequencies and smaller magnetics, pushing power density and opening space for smarter monitoring and predictive maintenance. Third, at the facility level, emerging 800 V DC “grid-to-rack” designs are redefining how AC-DC conversion is partitioned between central infrastructure and rack power shelves; future AI data centers will rely on tighter coupling between AI server AC-DC power supplies, medium-voltage UPS, DC busbars and local energy storage to balance explosive AI workload growth with grid stability and sustainability targets.

This report studies the global AI Server Power Supply production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for AI Server Power Supply 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 AI Server Power Supply that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global AI Server Power Supply total production and demand, 2021-2032, (K Units)

Global AI Server Power Supply total production value, 2021-2032, (USD Million)

Global AI Server Power Supply production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global AI Server Power Supply consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: AI Server Power Supply domestic production, consumption, key domestic manufacturers and share

Global AI Server Power Supply production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global AI Server Power Supply production by Power, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global AI Server Power Supply production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global AI Server Power Supply 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 Electronics, LITEON Technology, Acbel Polytech, Chicony Power Technology, Advanced Energy, Shenzhen Megmeet Electrical, Shenzhen Honor Electronic, Aohai Technology, China Greatwall Technology, FSP Group, 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 AI Server Power Supply market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Power, 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 AI Server Power Supply Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global AI Server Power Supply Market, Segmentation by Power:

Below 3 kW

3-5.5 kW

Above 5.5 kW

Global AI Server Power Supply Market, Segmentation by Certification:

Titanium Grade

Platinum Grade

Global AI Server Power Supply Market, Segmentation by Voltage:

12V

24V

48V

Others

Global AI Server Power Supply Market, Segmentation by Application:

GPU Server

ASIC Server

FPGA Server

Others

Companies Profiled:

Delta Electronics

LITEON Technology

Acbel Polytech

Chicony Power Technology

Advanced Energy

Shenzhen Megmeet Electrical

Shenzhen Honor Electronic

Aohai Technology

China Greatwall Technology

FSP Group

Phihong

Murata

Shenzhen Gospower

Zippy Technology

SilverStone

Beijing Dynamic Power

Huawei

Mean Well

Salcomp

Key Questions Answered:

1. How big is the global AI Server Power Supply market?
2. What is the demand of the global AI Server Power Supply market?
3. What is the year over year growth of the global AI Server Power Supply market?
4. What is the production and production value of the global AI Server Power Supply market?
5. Who are the key producers in the global AI Server Power Supply market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 AI Server Power Supply Introduction
- 1.2 World AI Server Power Supply Supply & Forecast
 - 1.2.1 World AI Server Power Supply Production Value (2021 & 2025 & 2032)
 - 1.2.2 World AI Server Power Supply Production (2021-2032)
 - 1.2.3 World AI Server Power Supply Pricing Trends (2021-2032)
- 1.3 World AI Server Power Supply Production by Region (Based on Production Site)
 - 1.3.1 World AI Server Power Supply Production Value by Region (2021-2032)
 - 1.3.2 World AI Server Power Supply Production by Region (2021-2032)
 - 1.3.3 World AI Server Power Supply Average Price by Region (2021-2032)
 - 1.3.4 North America AI Server Power Supply Production (2021-2032)
 - 1.3.5 Europe AI Server Power Supply Production (2021-2032)
 - 1.3.6 China AI Server Power Supply Production (2021-2032)
 - 1.3.7 Japan AI Server Power Supply Production (2021-2032)
 - 1.3.8 South Korea AI Server Power Supply Production (2021-2032)
 - 1.3.9 Southeast Asia AI Server Power Supply Production (2021-2032)
 - 1.3.10 Taiwan AI Server Power Supply Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 AI Server Power Supply Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 AI Server Power Supply Major Market Trends

2 DEMAND SUMMARY

- 2.1 World AI Server Power Supply Demand (2021-2032)
- 2.2 World AI Server Power Supply Consumption by Region
 - 2.2.1 World AI Server Power Supply Consumption by Region (2021-2026)
 - 2.2.2 World AI Server Power Supply Consumption Forecast by Region (2027-2032)
- 2.3 United States AI Server Power Supply Consumption (2021-2032)
- 2.4 China AI Server Power Supply Consumption (2021-2032)
- 2.5 Europe AI Server Power Supply Consumption (2021-2032)
- 2.6 Japan AI Server Power Supply Consumption (2021-2032)
- 2.7 South Korea AI Server Power Supply Consumption (2021-2032)
- 2.8 ASEAN AI Server Power Supply Consumption (2021-2032)
- 2.9 India AI Server Power Supply Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World AI Server Power Supply Production Value by Manufacturer (2021-2026)
- 3.2 World AI Server Power Supply Production by Manufacturer (2021-2026)
- 3.3 World AI Server Power Supply Average Price by Manufacturer (2021-2026)
- 3.4 AI Server Power Supply Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global AI Server Power Supply Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for AI Server Power Supply in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for AI Server Power Supply in 2025
- 3.6 AI Server Power Supply Market: Overall Company Footprint Analysis
 - 3.6.1 AI Server Power Supply Market: Region Footprint
 - 3.6.2 AI Server Power Supply Market: Company Product Type Footprint
 - 3.6.3 AI Server Power Supply Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: AI Server Power Supply Production Value Comparison
 - 4.1.1 United States VS China: AI Server Power Supply Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: AI Server Power Supply Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: AI Server Power Supply Production Comparison
 - 4.2.1 United States VS China: AI Server Power Supply Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: AI Server Power Supply Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: AI Server Power Supply Consumption Comparison
 - 4.3.1 United States VS China: AI Server Power Supply Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: AI Server Power Supply Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based AI Server Power Supply Manufacturers and Market Share,

2021-2026

4.4.1 United States Based AI Server Power Supply Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers AI Server Power Supply Production Value (2021-2026)

4.4.3 United States Based Manufacturers AI Server Power Supply Production (2021-2026)

4.5 China Based AI Server Power Supply Manufacturers and Market Share

4.5.1 China Based AI Server Power Supply Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers AI Server Power Supply Production Value (2021-2026)

4.5.3 China Based Manufacturers AI Server Power Supply Production (2021-2026)

4.6 Rest of World Based AI Server Power Supply Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based AI Server Power Supply Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers AI Server Power Supply Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers AI Server Power Supply Production (2021-2026)

5 MARKET ANALYSIS BY POWER

5.1 World AI Server Power Supply Market Size Overview by Power: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Power

5.2.1 Below 3 kW

5.2.2 3-5.5 kW

5.2.3 Above 5.5 kW

5.3 Market Segment by Power

5.3.1 World AI Server Power Supply Production by Power (2021-2032)

5.3.2 World AI Server Power Supply Production Value by Power (2021-2032)

5.3.3 World AI Server Power Supply Average Price by Power (2021-2032)

6 MARKET ANALYSIS BY CERTIFICATION

6.1 World AI Server Power Supply Market Size Overview by Certification: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Certification

6.2.1 Titanium Grade

6.2.2 Platinum Grade

6.3 Market Segment by Certification

6.3.1 World AI Server Power Supply Production by Certification (2021-2032)

6.3.2 World AI Server Power Supply Production Value by Certification (2021-2032)

6.3.3 World AI Server Power Supply Average Price by Certification (2021-2032)

7 MARKET ANALYSIS BY VOLTAGE

7.1 World AI Server Power Supply Market Size Overview by Voltage: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Voltage

7.2.1 12V

7.2.2 24V

7.2.3 48V

7.2.4 Others

7.3 Market Segment by Voltage

7.3.1 World AI Server Power Supply Production by Voltage (2021-2032)

7.3.2 World AI Server Power Supply Production Value by Voltage (2021-2032)

7.3.3 World AI Server Power Supply Average Price by Voltage (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World AI Server Power Supply Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 GPU Server

8.2.2 ASIC Server

8.2.3 FPGA Server

8.2.4 Others

8.3 Market Segment by Application

8.3.1 World AI Server Power Supply Production by Application (2021-2032)

8.3.2 World AI Server Power Supply Production Value by Application (2021-2032)

8.3.3 World AI Server Power Supply Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Delta Electronics

- 9.1.1 Delta Electronics Details
- 9.1.2 Delta Electronics Major Business
- 9.1.3 Delta Electronics AI Server Power Supply Product and Services
- 9.1.4 Delta Electronics AI Server Power Supply Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.1.5 Delta Electronics Recent Developments/Updates
- 9.1.6 Delta Electronics Competitive Strengths & Weaknesses
- 9.2 LITEON Technology
 - 9.2.1 LITEON Technology Details
 - 9.2.2 LITEON Technology Major Business
 - 9.2.3 LITEON Technology AI Server Power Supply Product and Services
 - 9.2.4 LITEON Technology AI Server Power Supply Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.2.5 LITEON Technology Recent Developments/Updates
 - 9.2.6 LITEON Technology Competitive Strengths & Weaknesses
- 9.3 Acbel Polytech
 - 9.3.1 Acbel Polytech Details
 - 9.3.2 Acbel Polytech Major Business
 - 9.3.3 Acbel Polytech AI Server Power Supply Product and Services
 - 9.3.4 Acbel Polytech AI Server Power Supply Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.3.5 Acbel Polytech Recent Developments/Updates
 - 9.3.6 Acbel Polytech Competitive Strengths & Weaknesses
- 9.4 Chicony Power Technology
 - 9.4.1 Chicony Power Technology Details
 - 9.4.2 Chicony Power Technology Major Business
 - 9.4.3 Chicony Power Technology AI Server Power Supply Product and Services
 - 9.4.4 Chicony Power Technology AI Server Power Supply Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 Chicony Power Technology Recent Developments/Updates
 - 9.4.6 Chicony Power Technology Competitive Strengths & Weaknesses
- 9.5 Advanced Energy
 - 9.5.1 Advanced Energy Details
 - 9.5.2 Advanced Energy Major Business
 - 9.5.3 Advanced Energy AI Server Power Supply Product and Services
 - 9.5.4 Advanced Energy AI Server Power Supply Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Advanced Energy Recent Developments/Updates
 - 9.5.6 Advanced Energy Competitive Strengths & Weaknesses

9.6 Shenzhen Megmeet Electrical

9.6.1 Shenzhen Megmeet Electrical Details

9.6.2 Shenzhen Megmeet Electrical Major Business

9.6.3 Shenzhen Megmeet Electrical AI Server Power Supply Product and Services

9.6.4 Shenzhen Megmeet Electrical AI Server Power Supply Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Shenzhen Megmeet Electrical Recent Developments/Updates

9.6.6 Shenzhen Megmeet Electrical Competitive Strengths & Weaknesses

9.7 Shenzhen Honor Electronic

9.7.1 Shenzhen Honor Electronic Details

9.7.2 Shenzhen Honor Electronic Major Business

9.7.3 Shenzhen Honor Electronic AI Server Power Supply Product and Services

9.7.4 Shenzhen Honor Electronic AI Server Power Supply Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Shenzhen Honor Electronic Recent Developments/Updates

9.7.6 Shenzhen Honor Electronic Competitive Strengths & Weaknesses

9.8 Aohai Technology

9.8.1 Aohai Technology Details

9.8.2 Aohai Technology Major Business

9.8.3 Aohai Technology AI Server Power Supply Product and Services

9.8.4 Aohai Technology AI Server Power Supply Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Aohai Technology Recent Developments/Updates

9.8.6 Aohai Technology Competitive Strengths & Weaknesses

9.9 China Greatwall Technology

9.9.1 China Greatwall Technology Details

9.9.2 China Greatwall Technology Major Business

9.9.3 China Greatwall Technology AI Server Power Supply Product and Services

9.9.4 China Greatwall Technology AI Server Power Supply Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 China Greatwall Technology Recent Developments/Updates

9.9.6 China Greatwall Technology Competitive Strengths & Weaknesses

9.10 FSP Group

9.10.1 FSP Group Details

9.10.2 FSP Group Major Business

9.10.3 FSP Group AI Server Power Supply Product and Services

9.10.4 FSP Group AI Server Power Supply Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 FSP Group Recent Developments/Updates

- 9.10.6 FSP Group Competitive Strengths & Weaknesses
- 9.11 Pihong
 - 9.11.1 Pihong Details
 - 9.11.2 Pihong Major Business
 - 9.11.3 Pihong AI Server Power Supply Product and Services
 - 9.11.4 Pihong AI Server Power Supply Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Pihong Recent Developments/Updates
 - 9.11.6 Pihong Competitive Strengths & Weaknesses
- 9.12 Murata
 - 9.12.1 Murata Details
 - 9.12.2 Murata Major Business
 - 9.12.3 Murata AI Server Power Supply Product and Services
 - 9.12.4 Murata AI Server Power Supply Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Murata Recent Developments/Updates
 - 9.12.6 Murata Competitive Strengths & Weaknesses
- 9.13 Shenzhen Gospower
 - 9.13.1 Shenzhen Gospower Details
 - 9.13.2 Shenzhen Gospower Major Business
 - 9.13.3 Shenzhen Gospower AI Server Power Supply Product and Services
 - 9.13.4 Shenzhen Gospower AI Server Power Supply Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Shenzhen Gospower Recent Developments/Updates
 - 9.13.6 Shenzhen Gospower Competitive Strengths & Weaknesses
- 9.14 Zippy Technology
 - 9.14.1 Zippy Technology Details
 - 9.14.2 Zippy Technology Major Business
 - 9.14.3 Zippy Technology AI Server Power Supply Product and Services
 - 9.14.4 Zippy Technology AI Server Power Supply Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Zippy Technology Recent Developments/Updates
 - 9.14.6 Zippy Technology Competitive Strengths & Weaknesses
- 9.15 SilverStone
 - 9.15.1 SilverStone Details
 - 9.15.2 SilverStone Major Business
 - 9.15.3 SilverStone AI Server Power Supply Product and Services
 - 9.15.4 SilverStone AI Server Power Supply Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.15.5 SilverStone Recent Developments/Updates
- 9.15.6 SilverStone Competitive Strengths & Weaknesses
- 9.16 Beijing Dynamic Power
 - 9.16.1 Beijing Dynamic Power Details
 - 9.16.2 Beijing Dynamic Power Major Business
 - 9.16.3 Beijing Dynamic Power AI Server Power Supply Product and Services
 - 9.16.4 Beijing Dynamic Power AI Server Power Supply Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.16.5 Beijing Dynamic Power Recent Developments/Updates
 - 9.16.6 Beijing Dynamic Power Competitive Strengths & Weaknesses
- 9.17 Huawei
 - 9.17.1 Huawei Details
 - 9.17.2 Huawei Major Business
 - 9.17.3 Huawei AI Server Power Supply Product and Services
 - 9.17.4 Huawei AI Server Power Supply Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.17.5 Huawei Recent Developments/Updates
 - 9.17.6 Huawei Competitive Strengths & Weaknesses
- 9.18 Mean Well
 - 9.18.1 Mean Well Details
 - 9.18.2 Mean Well Major Business
 - 9.18.3 Mean Well AI Server Power Supply Product and Services
 - 9.18.4 Mean Well AI Server Power Supply Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.18.5 Mean Well Recent Developments/Updates
 - 9.18.6 Mean Well Competitive Strengths & Weaknesses
- 9.19 Salcomp
 - 9.19.1 Salcomp Details
 - 9.19.2 Salcomp Major Business
 - 9.19.3 Salcomp AI Server Power Supply Product and Services
 - 9.19.4 Salcomp AI Server Power Supply Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.19.5 Salcomp Recent Developments/Updates
 - 9.19.6 Salcomp Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 AI Server Power Supply Industry Chain
- 10.2 AI Server Power Supply Upstream Analysis

- 10.2.1 AI Server Power Supply Core Raw Materials
- 10.2.2 Main Manufacturers of AI Server Power Supply Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 AI Server Power Supply Production Mode
- 10.6 AI Server Power Supply Procurement Model
- 10.7 AI Server Power Supply Industry Sales Model and Sales Channels
 - 10.7.1 AI Server Power Supply Sales Model
 - 10.7.2 AI Server Power Supply Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

- 12.1 Methodology
- 12.2 Research Process and Data Source
- 12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World AI Server Power Supply Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World AI Server Power Supply Production Value by Region (2021-2026) & (USD Million)

Table 3. World AI Server Power Supply Production Value by Region (2027-2032) & (USD Million)

Table 4. World AI Server Power Supply Production Value Market Share by Region (2021-2026)

Table 5. World AI Server Power Supply Production Value Market Share by Region (2027-2032)

Table 6. World AI Server Power Supply Production by Region (2021-2026) & (K Units)

Table 7. World AI Server Power Supply Production by Region (2027-2032) & (K Units)

Table 8. World AI Server Power Supply Production Market Share by Region (2021-2026)

Table 9. World AI Server Power Supply Production Market Share by Region (2027-2032)

Table 10. World AI Server Power Supply Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World AI Server Power Supply Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. AI Server Power Supply Major Market Trends

Table 13. World AI Server Power Supply Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)

Table 14. World AI Server Power Supply Consumption by Region (2021-2026) & (K Units)

Table 15. World AI Server Power Supply Consumption Forecast by Region (2027-2032) & (K Units)

Table 16. World AI Server Power Supply Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key AI Server Power Supply Producers in 2025

Table 18. World AI Server Power Supply Production by Manufacturer (2021-2026) & (K Units)

Table 19. Production Market Share of Key AI Server Power Supply Producers in 2025

Table 20. World AI Server Power Supply Average Price by Manufacturer (2021-2026) &

(US\$/Unit)

Table 21. Global AI Server Power Supply Company Evaluation Quadrant

Table 22. World AI Server Power Supply Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and AI Server Power Supply Production Site of Key Manufacturer

Table 24. AI Server Power Supply Market: Company Product Type Footprint

Table 25. AI Server Power Supply Market: Company Product Application Footprint

Table 26. AI Server Power Supply Competitive Factors

Table 27. AI Server Power Supply New Entrant and Capacity Expansion Plans

Table 28. AI Server Power Supply Mergers & Acquisitions Activity

Table 29. United States VS China AI Server Power Supply Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China AI Server Power Supply Production Comparison, (2021 & 2025 & 2032) & (K Units)

Table 31. United States VS China AI Server Power Supply Consumption Comparison, (2021 & 2025 & 2032) & (K Units)

Table 32. United States Based AI Server Power Supply Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers AI Server Power Supply Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers AI Server Power Supply Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers AI Server Power Supply Production (2021-2026) & (K Units)

Table 36. United States Based Manufacturers AI Server Power Supply Production Market Share (2021-2026)

Table 37. China Based AI Server Power Supply Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers AI Server Power Supply Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers AI Server Power Supply Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers AI Server Power Supply Production, (2021-2026) & (K Units)

Table 41. China Based Manufacturers AI Server Power Supply Production Market Share (2021-2026)

Table 42. Rest of World Based AI Server Power Supply Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers AI Server Power Supply Production

Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers AI Server Power Supply Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers AI Server Power Supply Production, (2021-2026) & (K Units)

Table 46. Rest of World Based Manufacturers AI Server Power Supply Production Market Share (2021-2026)

Table 47. World AI Server Power Supply Production Value by Power, (USD Million), 2021 & 2025 & 2032

Table 48. World AI Server Power Supply Production by Power (2021-2026) & (K Units)

Table 49. World AI Server Power Supply Production by Power (2027-2032) & (K Units)

Table 50. World AI Server Power Supply Production Value by Power (2021-2026) & (USD Million)

Table 51. World AI Server Power Supply Production Value by Power (2027-2032) & (USD Million)

Table 52. World AI Server Power Supply Average Price by Power (2021-2026) & (US\$/Unit)

Table 53. World AI Server Power Supply Average Price by Power (2027-2032) & (US\$/Unit)

Table 54. World AI Server Power Supply Production Value by Certification, (USD Million), 2021 & 2025 & 2032

Table 55. World AI Server Power Supply Production by Certification (2021-2026) & (K Units)

Table 56. World AI Server Power Supply Production by Certification (2027-2032) & (K Units)

Table 57. World AI Server Power Supply Production Value by Certification (2021-2026) & (USD Million)

Table 58. World AI Server Power Supply Production Value by Certification (2027-2032) & (USD Million)

Table 59. World AI Server Power Supply Average Price by Certification (2021-2026) & (US\$/Unit)

Table 60. World AI Server Power Supply Average Price by Certification (2027-2032) & (US\$/Unit)

Table 61. World AI Server Power Supply Production Value by Voltage, (USD Million), 2021 & 2025 & 2032

Table 62. World AI Server Power Supply Production by Voltage (2021-2026) & (K Units)

Table 63. World AI Server Power Supply Production by Voltage (2027-2032) & (K Units)

Table 64. World AI Server Power Supply Production Value by Voltage (2021-2026) & (USD Million)

Table 65. World AI Server Power Supply Production Value by Voltage (2027-2032) & (USD Million)

Table 66. World AI Server Power Supply Average Price by Voltage (2021-2026) & (US\$/Unit)

Table 67. World AI Server Power Supply Average Price by Voltage (2027-2032) & (US\$/Unit)

Table 68. World AI Server Power Supply Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World AI Server Power Supply Production by Application (2021-2026) & (K Units)

Table 70. World AI Server Power Supply Production by Application (2027-2032) & (K Units)

Table 71. World AI Server Power Supply Production Value by Application (2021-2026) & (USD Million)

Table 72. World AI Server Power Supply Production Value by Application (2027-2032) & (USD Million)

Table 73. World AI Server Power Supply Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World AI Server Power Supply Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Delta Electronics Basic Information, Manufacturing Base and Competitors

Table 76. Delta Electronics Major Business

Table 77. Delta Electronics AI Server Power Supply Product and Services

Table 78. Delta Electronics AI Server Power Supply Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Delta Electronics Recent Developments/Updates

Table 80. Delta Electronics Competitive Strengths & Weaknesses

Table 81. LITEON Technology Basic Information, Manufacturing Base and Competitors

Table 82. LITEON Technology Major Business

Table 83. LITEON Technology AI Server Power Supply Product and Services

Table 84. LITEON Technology AI Server Power Supply Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. LITEON Technology Recent Developments/Updates

Table 86. LITEON Technology Competitive Strengths & Weaknesses

Table 87. Acbel Polytech Basic Information, Manufacturing Base and Competitors

Table 88. Acbel Polytech Major Business

Table 89. Acbel Polytech AI Server Power Supply Product and Services

- Table 90. Acbel Polytech AI Server Power Supply Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 91. Acbel Polytech Recent Developments/Updates
- Table 92. Acbel Polytech Competitive Strengths & Weaknesses
- Table 93. Chicony Power Technology Basic Information, Manufacturing Base and Competitors
- Table 94. Chicony Power Technology Major Business
- Table 95. Chicony Power Technology AI Server Power Supply Product and Services
- Table 96. Chicony Power Technology AI Server Power Supply Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 97. Chicony Power Technology Recent Developments/Updates
- Table 98. Chicony Power Technology Competitive Strengths & Weaknesses
- Table 99. Advanced Energy Basic Information, Manufacturing Base and Competitors
- Table 100. Advanced Energy Major Business
- Table 101. Advanced Energy AI Server Power Supply Product and Services
- Table 102. Advanced Energy AI Server Power Supply Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 103. Advanced Energy Recent Developments/Updates
- Table 104. Advanced Energy Competitive Strengths & Weaknesses
- Table 105. Shenzhen Megmeet Electrical Basic Information, Manufacturing Base and Competitors
- Table 106. Shenzhen Megmeet Electrical Major Business
- Table 107. Shenzhen Megmeet Electrical AI Server Power Supply Product and Services
- Table 108. Shenzhen Megmeet Electrical AI Server Power Supply Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 109. Shenzhen Megmeet Electrical Recent Developments/Updates
- Table 110. Shenzhen Megmeet Electrical Competitive Strengths & Weaknesses
- Table 111. Shenzhen Honor Electronic Basic Information, Manufacturing Base and Competitors
- Table 112. Shenzhen Honor Electronic Major Business
- Table 113. Shenzhen Honor Electronic AI Server Power Supply Product and Services
- Table 114. Shenzhen Honor Electronic AI Server Power Supply Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 115. Shenzhen Honor Electronic Recent Developments/Updates

- Table 116. Shenzhen Honor Electronic Competitive Strengths & Weaknesses
- Table 117. Aohai Technology Basic Information, Manufacturing Base and Competitors
- Table 118. Aohai Technology Major Business
- Table 119. Aohai Technology AI Server Power Supply Product and Services
- Table 120. Aohai Technology AI Server Power Supply Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 121. Aohai Technology Recent Developments/Updates
- Table 122. Aohai Technology Competitive Strengths & Weaknesses
- Table 123. China Greatwall Technology Basic Information, Manufacturing Base and Competitors
- Table 124. China Greatwall Technology Major Business
- Table 125. China Greatwall Technology AI Server Power Supply Product and Services
- Table 126. China Greatwall Technology AI Server Power Supply Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 127. China Greatwall Technology Recent Developments/Updates
- Table 128. China Greatwall Technology Competitive Strengths & Weaknesses
- Table 129. FSP Group Basic Information, Manufacturing Base and Competitors
- Table 130. FSP Group Major Business
- Table 131. FSP Group AI Server Power Supply Product and Services
- Table 132. FSP Group AI Server Power Supply Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 133. FSP Group Recent Developments/Updates
- Table 134. FSP Group Competitive Strengths & Weaknesses
- Table 135. Phihong Basic Information, Manufacturing Base and Competitors
- Table 136. Phihong Major Business
- Table 137. Phihong AI Server Power Supply Product and Services
- Table 138. Phihong AI Server Power Supply Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 139. Phihong Recent Developments/Updates
- Table 140. Phihong Competitive Strengths & Weaknesses
- Table 141. Murata Basic Information, Manufacturing Base and Competitors
- Table 142. Murata Major Business
- Table 143. Murata AI Server Power Supply Product and Services
- Table 144. Murata AI Server Power Supply Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 145. Murata Recent Developments/Updates
- Table 146. Murata Competitive Strengths & Weaknesses

Table 147. Shenzhen Gospower Basic Information, Manufacturing Base and Competitors

Table 148. Shenzhen Gospower Major Business

Table 149. Shenzhen Gospower AI Server Power Supply Product and Services

Table 150. Shenzhen Gospower AI Server Power Supply Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Shenzhen Gospower Recent Developments/Updates

Table 152. Shenzhen Gospower Competitive Strengths & Weaknesses

Table 153. Zippy Technology Basic Information, Manufacturing Base and Competitors

Table 154. Zippy Technology Major Business

Table 155. Zippy Technology AI Server Power Supply Product and Services

Table 156. Zippy Technology AI Server Power Supply Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Zippy Technology Recent Developments/Updates

Table 158. Zippy Technology Competitive Strengths & Weaknesses

Table 159. SilverStone Basic Information, Manufacturing Base and Competitors

Table 160. SilverStone Major Business

Table 161. SilverStone AI Server Power Supply Product and Services

Table 162. SilverStone AI Server Power Supply Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. SilverStone Recent Developments/Updates

Table 164. SilverStone Competitive Strengths & Weaknesses

Table 165. Beijing Dynamic Power Basic Information, Manufacturing Base and Competitors

Table 166. Beijing Dynamic Power Major Business

Table 167. Beijing Dynamic Power AI Server Power Supply Product and Services

Table 168. Beijing Dynamic Power AI Server Power Supply Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. Beijing Dynamic Power Recent Developments/Updates

Table 170. Beijing Dynamic Power Competitive Strengths & Weaknesses

Table 171. Huawei Basic Information, Manufacturing Base and Competitors

Table 172. Huawei Major Business

Table 173. Huawei AI Server Power Supply Product and Services

Table 174. Huawei AI Server Power Supply Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 175. Huawei Recent Developments/Updates

- Table 176. Huawei Competitive Strengths & Weaknesses
- Table 177. Mean Well Basic Information, Manufacturing Base and Competitors
- Table 178. Mean Well Major Business
- Table 179. Mean Well AI Server Power Supply Product and Services
- Table 180. Mean Well AI Server Power Supply Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 181. Mean Well Recent Developments/Updates
- Table 182. Mean Well Competitive Strengths & Weaknesses
- Table 183. Salcomp Basic Information, Manufacturing Base and Competitors
- Table 184. Salcomp Major Business
- Table 185. Salcomp AI Server Power Supply Product and Services
- Table 186. Salcomp AI Server Power Supply Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 187. Salcomp Recent Developments/Updates
- Table 188. Salcomp Competitive Strengths & Weaknesses
- Table 189. Global Key Players of AI Server Power Supply Upstream (Raw Materials)
- Table 190. Global AI Server Power Supply Typical Customers
- Table 191. AI Server Power Supply Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. AI Server Power Supply Picture

Figure 2. World AI Server Power Supply Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World AI Server Power Supply Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World AI Server Power Supply Production (2021-2032) & (K Units)

Figure 5. World AI Server Power Supply Average Price (2021-2032) & (US\$/Unit)

Figure 6. World AI Server Power Supply Production Value Market Share by Region (2021-2032)

Figure 7. World AI Server Power Supply Production Market Share by Region (2021-2032)

Figure 8. North America AI Server Power Supply Production (2021-2032) & (K Units)

Figure 9. Europe AI Server Power Supply Production (2021-2032) & (K Units)

Figure 10. China AI Server Power Supply Production (2021-2032) & (K Units)

Figure 11. Japan AI Server Power Supply Production (2021-2032) & (K Units)

Figure 12. South Korea AI Server Power Supply Production (2021-2032) & (K Units)

Figure 13. Southeast Asia AI Server Power Supply Production (2021-2032) & (K Units)

Figure 14. Taiwan AI Server Power Supply Production (2021-2032) & (K Units)

Figure 15. AI Server Power Supply Market Drivers

Figure 16. Factors Affecting Demand

Figure 17. World AI Server Power Supply Consumption (2021-2032) & (K Units)

Figure 18. World AI Server Power Supply Consumption Market Share by Region (2021-2032)

Figure 19. United States AI Server Power Supply Consumption (2021-2032) & (K Units)

Figure 20. China AI Server Power Supply Consumption (2021-2032) & (K Units)

Figure 21. Europe AI Server Power Supply Consumption (2021-2032) & (K Units)

Figure 22. Japan AI Server Power Supply Consumption (2021-2032) & (K Units)

Figure 23. South Korea AI Server Power Supply Consumption (2021-2032) & (K Units)

Figure 24. ASEAN AI Server Power Supply Consumption (2021-2032) & (K Units)

Figure 25. India AI Server Power Supply Consumption (2021-2032) & (K Units)

Figure 26. Producer Shipments of AI Server Power Supply by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 27. Global Four-firm Concentration Ratios (CR4) for AI Server Power Supply Markets in 2025

Figure 28. Global Four-firm Concentration Ratios (CR8) for AI Server Power Supply

Markets in 2025

Figure 29. United States VS China: AI Server Power Supply Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States VS China: AI Server Power Supply Production Market Share Comparison (2021 & 2025 & 2032)

Figure 31. United States VS China: AI Server Power Supply Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 32. United States Based Manufacturers AI Server Power Supply Production Market Share 2025

Figure 33. China Based Manufacturers AI Server Power Supply Production Market Share 2025

Figure 34. Rest of World Based Manufacturers AI Server Power Supply Production Market Share 2025

Figure 35. World AI Server Power Supply Production Value by Power, (USD Million), 2021 & 2025 & 2032

Figure 36. World AI Server Power Supply Production Value Market Share by Power in 2025

Figure 37. Below 3 kW

Figure 38. 3-5.5 kW

Figure 39. Above 5.5 kW

Figure 40. World AI Server Power Supply Production Market Share by Power (2021-2032)

Figure 41. World AI Server Power Supply Production Value Market Share by Power (2021-2032)

Figure 42. World AI Server Power Supply Average Price by Power (2021-2032) & (US\$/Unit)

Figure 43. World AI Server Power Supply Production Value by Certification, (USD Million), 2021 & 2025 & 2032

Figure 44. World AI Server Power Supply Production Value Market Share by Certification in 2025

Figure 45. Titanium Grade

Figure 46. Platinum Grade

Figure 47. World AI Server Power Supply Production Market Share by Certification (2021-2032)

Figure 48. World AI Server Power Supply Production Value Market Share by Certification (2021-2032)

Figure 49. World AI Server Power Supply Average Price by Certification (2021-2032) & (US\$/Unit)

Figure 50. World AI Server Power Supply Production Value by Voltage, (USD Million),

2021 & 2025 & 2032

Figure 51. World AI Server Power Supply Production Value Market Share by Voltage in 2025

Figure 52. 12V

Figure 53. 24V

Figure 54. 48V

Figure 55. Others

Figure 56. World AI Server Power Supply Production Market Share by Voltage (2021-2032)

Figure 57. World AI Server Power Supply Production Value Market Share by Voltage (2021-2032)

Figure 58. World AI Server Power Supply Average Price by Voltage (2021-2032) & (US\$/Unit)

Figure 59. World AI Server Power Supply Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 60. World AI Server Power Supply Production Value Market Share by Application in 2025

Figure 61. GPU Server

Figure 62. ASIC Server

Figure 63. FPGA Server

Figure 64. Others

Figure 65. World AI Server Power Supply Production Market Share by Application (2021-2032)

Figure 66. World AI Server Power Supply Production Value Market Share by Application (2021-2032)

Figure 67. World AI Server Power Supply Average Price by Application (2021-2032) & (US\$/Unit)

Figure 68. AI Server Power Supply Industry Chain

Figure 69. AI Server Power Supply Procurement Model

Figure 70. AI Server Power Supply Sales Model

Figure 71. AI Server Power Supply Sales Channels, Direct Sales, and Distribution

Figure 72. Methodology

Figure 73. Research Process and Data Source

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