

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

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Abstracts

The global AI Server Rack-Level Power System market size is expected to reach \$ 4507 million by 2032, rising at a market growth of 11.7% CAGR during the forecast period (2026-2032).

AI Server Rack-Level Power System refers to an integrated power delivery architecture specifically designed for high-density artificial intelligence server racks, providing power conversion, distribution, monitoring, protection, and backup functions for GPU servers, AI accelerators, CPUs, storage systems, networking equipment, and associated data center infrastructure. The system typically integrates high-power-density AC/DC power modules, rack power shelves, intelligent power distribution units (iPDU), 48V/54V DC power bus architectures, emerging 800V DC power delivery solutions, battery backup units (BBU), and intelligent energy management technologies. This market focuses on rack-level power solutions capable of supporting the increasing power density requirements of AI computing clusters, enabling high efficiency, high reliability, and scalable power management for next-generation AI data centers.

Key Findings

AI server rack-level power systems reached approximately 40 thousand units in global production in 2025

The global average selling price reached approximately US\$50 thousand per rack-level power system in 2025

Global production capacity reached approximately 50 thousand units in 2025

supporting AI infrastructure expansion

Average industry gross margin reached approximately 34% driven by high-power density requirements

48V DC and emerging 800V DC architectures are becoming key technology directions for AI data center power systems

Market Trends

AI server rack-level power systems are undergoing rapid technological evolution driven by the continuous increase in GPU computing power consumption and AI cluster deployment density. Traditional AC power architectures are gradually being upgraded toward higher efficiency DC power delivery systems, with 48V/54V rack-level DC architectures becoming increasingly adopted in high-performance AI servers. Meanwhile, 800V DC power systems are emerging as a future-oriented solution for ultra-high-density AI data centers, supporting rack power levels beyond traditional server infrastructure limitations. The integration of intelligent power monitoring, digital energy management, modular power supplies, and battery backup technologies is also accelerating as operators seek improved energy efficiency, operational reliability, and simplified maintenance. Future product development will focus on higher power density, improved conversion efficiency, modular scalability, and deeper integration with liquid cooling and AI data center infrastructure management systems.

Market Dynamics

Drivers

The primary growth driver of AI server rack-level power systems is the rapid expansion of AI computing infrastructure, particularly large-scale GPU clusters, generative AI platforms, and enterprise AI data centers. Increasing rack power requirements caused by advanced AI accelerators are creating demand for higher-capacity power delivery solutions. The transition from conventional server power architectures toward rack-level DC distribution is further supported by the need to reduce power conversion losses, improve energy efficiency, and optimize data center operating costs. The development of hyperscale cloud computing, AI model training platforms, and high-performance computing facilities continues to accelerate adoption of advanced rack-level power

systems.

Restraints

The market faces limitations from high initial investment requirements, complex infrastructure upgrades, and compatibility challenges with existing data center power architectures. The adoption of advanced DC power systems requires changes in facility-level electrical infrastructure, operational standards, and maintenance capabilities. In addition, high-power rack systems require strict thermal management, safety protection, and reliability validation, increasing engineering complexity and deployment costs. Supply chain constraints for high-performance power semiconductors, magnetic components, and advanced power modules may also influence large-scale commercialization.

Opportunities

The transition toward next-generation AI data centers creates significant opportunities for suppliers developing high-efficiency DC power architectures, modular rack power systems, and integrated energy management solutions. The emergence of 800V DC architectures provides new growth opportunities for companies capable of delivering ultra-high-power conversion technologies. Integration between rack power systems, liquid cooling infrastructure, battery backup units, and intelligent data center management platforms is expected to create new solution-based business opportunities. Regional expansion of AI infrastructure investment in North America, China, Europe, Japan, and Southeast Asia will further support market development.

Challenges

The major industry challenges include rapidly changing AI hardware power requirements, technology standard uncertainty, and the need for continuous innovation in power conversion efficiency. AI server platforms are evolving quickly, requiring power system suppliers to frequently upgrade product designs and increase power density. The lack of unified standards for emerging high-voltage DC architectures may slow adoption in certain markets. Additionally, competition from global electrical equipment manufacturers and specialized power electronics suppliers requires companies to maintain strong engineering capabilities, manufacturing efficiency, and customer collaboration.

Industry Chain Analysis

The AI server rack-level power system industry chain consists of upstream power electronic components, midstream system manufacturers, and downstream AI data center operators. Upstream suppliers provide key components including power semiconductor devices, magnetic materials, capacitors, transformers, battery cells, thermal management components, and embedded control systems. Midstream companies integrate AC/DC conversion modules, rack power shelves, intelligent distribution systems, BBU solutions, and monitoring platforms into complete rack-level power architectures. Downstream applications are concentrated in hyperscale data centers, cloud computing providers, AI research facilities, enterprise AI infrastructure, and high-performance computing environments. Value creation mainly depends on power efficiency improvement, reliability enhancement, system integration capability, and adaptation to next-generation AI computing platforms.

Value Chain Analysis

The value chain of AI server rack-level power systems is centered on advanced power conversion technology, system integration, and data center deployment capability. Component suppliers contribute through semiconductor performance, energy efficiency, and reliability improvement. System manufacturers create value by integrating power modules, intelligent controls, protection mechanisms, and rack-level architectures. Solution providers and data center operators focus on deployment optimization, energy management, and lifecycle operation efficiency. Companies with strong capabilities in power electronics, thermal management coordination, and large-scale data center engineering are positioned to capture higher-value segments.

Segment Insights

By power architecture, traditional AC PSU architectures remain widely deployed due to compatibility with existing data center infrastructure, while 48V DC rack-level power systems represent the major transition direction for AI server environments because of improved efficiency and reduced transmission losses. Emerging 800V DC AI data center power systems are expected to become an important technology pathway for future ultra-high-density AI clusters. By power rating, higher-power systems above 5.5kW represent the fastest-growing segment as AI servers increasingly adopt high-performance GPUs and accelerator architectures. Rack-level power solutions are shifting from independent power supply products toward integrated infrastructure platforms combining power conversion, backup, monitoring, and intelligent management

functions.

Downstream Market Opportunities

The downstream market is primarily driven by AI computing infrastructure customers, including hyperscale cloud providers, AI model training centers, enterprise data centers, and high-performance computing facilities. GPU AI servers represent the largest application segment due to their high power consumption and rapid deployment in generative AI workloads. TPU, NPU/ASIC, and FPGA-based AI servers are also creating additional demand as customized AI acceleration architectures expand. Future opportunities will emerge from AI factories, autonomous driving computing centers, scientific computing platforms, and next-generation edge AI infrastructure requiring higher reliability and power density.

Regional Insights

North America represents one of the leading regions for AI server rack-level power system adoption, supported by strong hyperscale cloud investment, advanced data center infrastructure, and rapid deployment of AI computing facilities. The region has strong demand for high-power rack architectures and advanced power management solutions. China represents another major market supported by expanding AI infrastructure construction, domestic cloud computing development, and increasing demand for high-performance computing. Europe, Japan, South Korea, Taiwan, and Southeast Asia are also important markets, with competition focused on energy efficiency, localized supply chains, and advanced power technology capabilities.

Competitive Landscape Analysis

The competitive landscape of AI server rack-level power systems includes global electrical equipment leaders, specialized power electronics manufacturers, and data center infrastructure suppliers. Companies such as Schneider Electric, Vertiv, Eaton, Delta Electronics, Lite-On, AcBel, Advanced Energy, and FSP Group have established capabilities in power conversion, data center power infrastructure, and high-efficiency energy solutions. Chinese suppliers including Megmeet, Shenzhen Honor Electronic, China Greatwall Technology, and Shenzhen Gospower are strengthening their positions through high-power density power modules and AI data center applications.

Competition is increasingly focused on conversion efficiency, rack-level integration capability, intelligent monitoring, manufacturing scalability, and the ability to support future 800V DC AI infrastructure.

Report Scope

This report studies the global AI Server Rack-Level Power System production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global AI Server Rack-Level Power System total production and demand, 2021-2032, (Units)

Global AI Server Rack-Level Power System total production value, 2021-2032, (USD Million)

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

Global AI Server Rack-Level Power System consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: AI Server Rack-Level Power System domestic production, consumption, key domestic manufacturers and share

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

Global AI Server Rack-Level Power System production by Type, production,

value, CAGR, 2021-2032, (USD Million) & (Units)

Global AI Server Rack-Level Power System production by Application,
production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global AI Server Rack-Level Power System 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 Schneider Electric, Vertiv, Eaton, Lite-On, AcBel, Delta Electronics, Legrand, Shenzhen Megmeet Electrical, Advanced Energy, Shenzhen Honor Electronic, 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 Rack-Level Power System market

Detailed Segmentation:

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

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global AI Server Rack-Level Power System Market, Segmentation by Type:

Traditional AC PSU Architecture

48V DC Rack-Level Power System

800V DC AI Data Center Power System

Global AI Server Rack-Level Power System Market, Segmentation by Power Rating:

<3 kW

3-5.5kW

>5.5kW

Global AI Server Rack-Level Power System Market, Segmentation by Application:

GPU AI Servers

TPU Servers

NPU / ASIC AI Servers

FPGA AI Servers

Others

Companies Profiled:

Schneider Electric

Vertiv

Eaton

Lite-On

AcBel

Delta Electronics

Legrand

Shenzhen Megmeet Electrical

Advanced Energy

Shenzhen Honor Electronic

China Greatwall Technology

FSP Group

Murata

Shenzhen Gospower

Artesyn Technologies

Key Questions Answered

1. How big is the global AI Server Rack-Level Power System market?
2. What is the demand of the global AI Server Rack-Level Power System market?
3. What is the year over year growth of the global AI Server Rack-Level Power System market?
4. What is the total value of the global AI Server Rack-Level Power System market?
5. Who are the Major Players in the global AI Server Rack-Level Power System market?
6. What are the growth factors driving the market demand?

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