

Global AI Server Rack-Level Power System 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 AI Server Rack-Level Power System market size was valued at US\$ 2070 million in 2025 and is forecast to a readjusted size of US\$ 4507 million by 2032 with a CAGR of 11.7% during review period.

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 is a detailed and comprehensive analysis for global AI Server Rack-Level Power System 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 AI Server Rack-Level Power System market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global AI Server Rack-Level Power System market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global AI Server Rack-Level Power System market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global AI Server Rack-Level Power System market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 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 AI Server Rack-Level Power System

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 AI Server Rack-Level Power System 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 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.

AI Server Rack-Level Power System 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 Segmentation

Market segment by Type

Traditional AC PSU Architecture

48V DC Rack-Level Power System

800V DC AI Data Center Power System

Market segment by Power Rating

<3 kW

3-5.5kW

>5.5kW

Market segment by Application

GPU AI Servers

TPU Servers

NPU / ASIC AI Servers

FPGA AI Servers

Others

Major players covered

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

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)

Chapter Outline

Chapter 1, to describe AI Server Rack-Level Power System product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of AI Server Rack-Level Power System, with price, sales quantity, revenue, and global market share of AI Server Rack-Level Power System from 2021 to 2026.

Chapter 3, the AI Server Rack-Level Power System competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed

emphatically by landscape contrast.

Chapter 4, the AI Server Rack-Level Power System 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 AI Server Rack-Level Power System 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 AI Server Rack-Level Power System.

Chapter 14 and 15, to describe AI Server Rack-Level Power System sales channel, distributors, customers, research findings and conclusion.

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