

Global AI Server Rack Power Shelf 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 Power Shelf market size was valued at US\$ 1259 million in 2025 and is forecast to a readjusted size of US\$ 2966 million by 2032 with a CAGR of 12.9% during review period.

An AI Server Rack Power Shelf is a modular power distribution system installed within a server rack, specifically designed to convert incoming AC or HVDC power to the DC voltage levels required by AI servers (typically 48V or 54V bus architectures). The Power Shelf integrates multiple hot-swappable Power Supply Units (PSUs), a Power Management Controller (PMC), and intelligent monitoring capabilities to deliver high-density, redundant, and efficiently managed power to GPU-accelerated servers. These systems are critical infrastructure components in AI data centers, where rack power densities have escalated from traditional 20-30kW to 40-100kW+ for AI training clusters, with projections reaching 350-500kW per rack. AI server rack power shelves are designed to comply with OCP (Open Compute Project) standards and support both AC and HVDC input for operational flexibility. The global average selling price for AI server rack power shelves is approximately US\$5,500 per unit. The average sales volume in the base year is estimated at 222.4k units. The industry average gross margin is approximately 43%, with typical ranges between 38% and 48%. The upstream segment includes manufacturers of power semiconductors (GaN, SiC, IGBT), magnetic components, connectors, and thermal management components. The midstream segment comprises power shelf and PSU manufacturers that design, assemble, and integrate power conversion, distribution, and monitoring functions. The downstream segment encompasses hyperscale data centers, colocation providers, AI cloud service providers, and enterprise AI infrastructure teams that rely on these systems for high-

density, high-efficiency power delivery.

The AI server rack power shelf market is undergoing a structural transformation driven by the explosive growth of AI workloads and the corresponding escalation in rack power densities. Traditional enterprise racks operated at 5-10kW; AI training clusters now demand 40-60kW racks, large language models require at least 70kW, and next-generation AI factories are projected to reach 500-1000kW per rack. This power density escalation fundamentally changes power shelf specifications?standard power architectures cannot support modern GPU servers where individual accelerators now exceed 700W per device.

The market is witnessing a significant shift from traditional 12V distributed power architectures to 48V and 54V bus architectures, driven by the need to reduce copper losses and support longer bus runs in high-density racks. The migration from single-phase to three-phase rack power architectures is accelerating, with three-phase configurations holding 60.5% of the intelligent PDU market share in 2024. HVDC (High-Voltage Direct Current) architectures operating at 600-800V are emerging as the next frontier, with NVIDIA leading adoption expected to scale from 2027 onward.

Intelligent power shelves?combining metering, switching, telemetry, and predictive analytics?have become essential for AI-ready data centers. The integration of PMBus visibility, digital control, and predictive maintenance hooks has made power management a strategic capability rather than a commodity function. Cyber-hardened features, hot-swap designs, and advanced carbon-reporting functions have become decisive purchasing criteria as operators align with ESG reporting requirements. Sustainability targets are driving Titanium efficiency adoption, making efficiency a revenue lever rather than merely a cost consideration.

This report is a detailed and comprehensive analysis for global AI Server Rack Power Shelf 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 Power Shelf market size and forecasts, in consumption value (\$

Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

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

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

Global AI Server Rack Power Shelf market shares of main players, shipments in revenue (\$ Million), sales quantity (K 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 Power Shelf

- 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 Power Shelf 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 Holdings Co., Eaton Corporation, Legrand, Delta Electronics, Lite-On Technology, nVent Electric, Panduit, Rittal, Chatsworth Products, etc.

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

Market Segmentation

AI Server Rack Power Shelf 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

3 ? 8 kW Power Shelves

8 ? 12 kW Power Shelves

> 12 kW Power Shelves

Market segment by Intelligence Level

Basic Power Shelves

Monitored Power Shelves

Switched / Intelligent Power Shelves

Market segment by Cooling Method

Air-Cooled Power Shelves

Liquid-Cooled / Immersion-Ready Power Shelves

Market segment by Application

Hyperscale Data Centers

AI Cloud Service Providers

Others

Major players covered

Schneider Electric

Vertiv Holdings Co.

Eaton Corporation

Legrand

Delta Electronics

Lite-On Technology

nVent Electric

Panduit

Rittal

Chatsworth Products

CyberPower Systems

ATEN International

Enconnex

ZPE Systems

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 AI Server Rack Power Shelf product scope, market overview, market estimation caveats and base year.

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

Chapter 3, the AI Server Rack Power Shelf competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the AI Server Rack Power Shelf 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 Power Shelf 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 Power Shelf.

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

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