

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

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Abstracts

The global AI Server Rack Power Shelf market size is expected to reach \$ 2966 million by 2032, rising at a market growth of 12.9% CAGR during the forecast period (2026-2032).

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 studies the global AI Server Rack Power Shelf production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

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

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

Global AI Server Rack Power Shelf production by region & country, production, value,

CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

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

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

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

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

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

This report profiles key players in the global AI Server Rack Power Shelf 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World AI Server Rack Power Shelf 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 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 Power Shelf Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global AI Server Rack Power Shelf Market, Segmentation by Type:

3 ? 8 kW Power Shelves

8 ? 12 kW Power Shelves

> 12 kW Power Shelves

Global AI Server Rack Power Shelf Market, Segmentation by Intelligence Level:

Basic Power Shelves

Monitored Power Shelves

Switched / Intelligent Power Shelves

Global AI Server Rack Power Shelf Market, Segmentation by Cooling Method:

Air-Cooled Power Shelves

Liquid-Cooled / Immersion-Ready Power Shelves

Global AI Server Rack Power Shelf Market, Segmentation by Application:

Hyperscale Data Centers

AI Cloud Service Providers

Others

Companies Profiled:

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

Key Questions Answered:

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

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