

Global AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules 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 Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules market size was valued at US\$ 1595 million in 2025 and is forecast to a readjusted size of US\$ 9251 million by 2032 with a CAGR of 25.9% during review period.

AI training cluster rack-level rectifier modules and power shelf PSU modules refer to modular power-conversion units deployed in AI training clusters, high-performance computing racks, GPU-accelerated racks, OCP ORv3 / ORv3 HPR architectures and comparable high-density data-centre power systems. These products are typically supplied as hot-swappable PSUs, rectifier modules, front-end power modules or power-shelf-integrated conversion units. Their core function is to convert single-phase AC, three-phase AC or high-voltage DC input into rack-level 48V, 50V or 54V DC bus output, while supporting current sharing, N+1 or N+N redundancy, PMBus / I²C / Redfish communication, EDPP peak-load response, black-box fault logging and remote monitoring.

Typical commercial configurations include 3kW, 5.5kW and 6kW hot-pluggable modules, as well as 18kW, 33kW and higher-power shelves assembled from multiple PSU modules. Indicative transaction pricing for 3kW-5.5kW modules is generally in the several-hundred-dollar to low-four-digit-dollar range per module, while complete 33kW power shelf systems command materially higher pricing depending on certification level, input architecture, cooling design, firmware customisation and procurement scale.

Based on our research, AI training cluster rectifier modules should be understood as rack-level power-conversion building blocks rather than generic telecom rectifiers, consumer PSUs or facility-level UPS equipment. The core product boundary is the hot-swappable PSU or rectifier module installed in a power shelf, converting AC or high-voltage DC input into 48V, 50V or 54V rack-level DC output for GPU trays, AI servers, switch shelves and high-density compute nodes. The present industry architecture is largely shaped by OCP ORv3 and ORv3 HPR, where 18kW and 33kW shelves typically aggregate multiple 3kW or 5.5kW modules. Relative to conventional server PSUs, these modules place greater emphasis on rack-level current sharing, blind-mate connectivity, dynamic peak-load response, remote management, fault logging, high conversion efficiency and redundancy. Therefore, this report adopts a narrow market definition: general-purpose UPS systems, PDUs, connectors, busbars, board-level DC/DC devices and ordinary telecom rectifiers are excluded from the revenue model unless there is clear evidence that they are deployed as AI/HPC rack-level power shelf modules.

From a supply-side perspective, the global market is led by Taiwanese power-electronics manufacturers, supported by US and European data-centre infrastructure vendors, Japanese high-reliability power suppliers and an emerging group of Chinese vendors. Delta, Lite-On, AcBel, Chicony Power and Compuware have strong foundations in server PSUs, ODM collaboration and high-efficiency manufacturing. Advanced Energy benefits from its Artesyn heritage and a clear OCP-compliant product portfolio. Vertiv, Eaton and Schneider Electric are approaching the segment from the broader data-centre power infrastructure layer, integrating rack-level DC power shelves into AI and HPC deployment architectures. Murata provides OCP-compatible centralized power systems with a strong reliability and component-engineering background. In mainland China, Gospower has disclosed AI server power and power shelf products on its official website, while Megmeet appears to be positioning itself around advanced data-centre power and 800V DC solutions; however, product-level disclosure and revenue attribution still require further verification.

Demand is being driven by three structural forces: the rising power density of GPU racks, the rapid build-out of hyperscale and neocloud training clusters, and the retrofitting of legacy data centres into AI-ready environments. As rack power moves from tens of kilowatts towards 100kW and beyond, power shelves are becoming a key constraint and a key opportunity. They determine not only electrical conversion efficiency but also rack space, thermal load, serviceability and reliability. NVIDIA's 800V DC initiative highlights the longer-term limitation of today's 54V rack power distribution in very high-power AI factories, especially in relation to copper mass, space

consumption and repeated conversion losses. This does not eliminate the near-term opportunity for 48V/54V power shelf modules; rather, it suggests that the market will evolve from 3kW and 5.5kW ORv3 modules toward higher-power modules, liquid-cooled power supplies, rack-level energy buffering and eventually higher-voltage DC architectures.

The competitive logic of the sector will increasingly depend on system capability rather than standalone PSU manufacturing. Key differentiators include high conversion efficiency, Ruby-class certification, 5.5kW-to-18kW module roadmaps, EDPP response, liquid-cooling compatibility, telemetry, firmware customisation, OCP/NVIDIA ecosystem alignment, supply-chain resilience and global manufacturing footprint. The market remains in a high-growth phase for 2025-2027, but it is not structurally static. Suppliers that remain confined to conventional 48V modules may face architectural displacement if 800V HVDC moves into mass deployment after 2027. Conversely, suppliers able to bridge current ORv3/HPR power shelves with future high-voltage DC and liquid-cooled architectures are likely to command higher strategic value.

This report is a detailed and comprehensive analysis for global AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Product Form Factor 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 Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules 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 Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules market size and forecasts, by Product Form Factor and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit),

2021-2032

Global AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules 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 Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules

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 Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules 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 Delta Electronics, Inc., LITE-ON Technology Corporation, Advanced Energy Industries, Inc., Vertiv Holdings Co., AcBel Polytech Inc., Compuware Technology Inc., Chicony Power Technology Co., Ltd., Murata Manufacturing Co., Ltd., Eaton Corporation plc, Schneider Electric SE, etc.

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

Market Segmentation

AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules market is split by Product Form Factor and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Product Form Factor, 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 Product Form Factor

Hot-swappable Rectifier / PSU Module

Power Shelf Assembly

Integrated Rack DC Power System

Other

Market segment by Output Voltage

48V DC Output

50V DC Output

54V DC Output

Configurable Output

Other

Market segment by Input Architecture

Single-phase AC Input

Three-phase AC Input

HVDC Input

Hybrid Input

Market segment by Cooling Method

Air-cooled PSU

Hybrid-cooled PSU

Liquid-cooled PSU / Power Shelf

Immersion-compatible PSU

Market segment by Application

AI Training GPU Rack

HPC Cluster Rack

Hyperscale Data Center Rack

AI-ready Retrofit Rack

Other

Major players covered

Delta Electronics, Inc.

LITE-ON Technology Corporation

Advanced Energy Industries, Inc.

Vertiv Holdings Co.

AcBel Polytech Inc.

Compuware Technology Inc.

Chicony Power Technology Co., Ltd.

Murata Manufacturing Co., Ltd.

Eaton Corporation plc

Schneider Electric SE

FSP Technology Inc.

Guangdong Gospower Electric Technology Co., Ltd.

Shenzhen Megmeet Electrical Co., Ltd.

Bel Fuse Inc.

OmniOn Power Inc.

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 Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules, with price, sales quantity, revenue, and global market share of AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules from 2021 to 2026.

Chapter 3, the AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules competitive situation, sales quantity, revenue, and global market share of top

manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules 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 Product Form Factor and by Application, with sales market share and growth rate by Product Form Factor, 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 Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules market forecast, by regions, by Product Form Factor, 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 Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules.

Chapter 14 and 15, to describe AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules sales channel, distributors, customers, research findings and conclusion.

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