

Global Baseplate-Cooled AC-DC Power Supply Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Baseplate-Cooled AC-DC Power Supply market size is expected to reach \$ 1396 million by 2032, rising at a market growth of 6.2% CAGR during the forecast period (2026-2032).

Substrate-based AC-DC power supplies constitute a class of power modules that utilize an insulated substrate structure to convert AC input power into DC output power. This conversion from AC supply to DC output is achieved through circuitry involving high-frequency switching, voltage rectification, filtering and regulation, as well as isolation and protection mechanisms. Furthermore, the substrate structure facilitates thermal conduction, integrated heat dissipation, and high-density packaging, making these modules ideally suited to meet the power supply requirements of communication equipment, industrial control systems, automation systems, instrumentation, and embedded devices?sectors that demand high standards regarding compactness, efficiency, and stability. In 2025, global sales volume for substrate-based AC-DC power supplies is projected to reach approximately 8.8 million units, with an average unit price of approximately \$102 and a capacity utilization rate of approximately 74%. The upstream sector primarily comprises manufacturers of power semiconductor devices, suppliers of inductive magnetic components, providers of high-voltage capacitors and filters, design firms for control chips, suppliers of substrate materials and copper foil, and providers of insulation and thermal management materials. The downstream sector mainly consists of manufacturers of communication equipment, automation control systems, industrial robots, medical electronics, servers and networking equipment, rail transit electrical systems, new energy charging infrastructure, and test and measurement equipment; the industry's average gross margin stands at approximately 29%. Regarding the product cost structure, power devices and driver chips account for approximately 27%; magnetic components for 15%; high-voltage capacitors and filtering

components for 11%; substrate and insulation/thermal materials for 14%; structural parts and connectors for 8%; assembly and testing for 10%; certification and quality control for 5%; packaging and logistics for 4%; and R&D and technical support for 6%. Downstream demand applications include power supply for communication modules, industrial control boards, main control boards in automation equipment, robot controllers, medical device motherboards, networking equipment, embedded systems, rail transit auxiliary power systems, control units for new energy charging piles, and test systems. Key downstream customers include Huawei, ZTE, Cisco, Ericsson, Siemens, ABB, Schneider Electric, Bosch Rexroth, Mitsubishi Electric, Rockwell Automation, GE Healthcare, Philips Healthcare, Amphenol, Inspur, BYD, CATL, and various large-scale system integrators. In terms of business opportunities, policy-driven growth stems from industrial digital upgrades, energy efficiency requirements for communication base stations, electrification standards for rail transit, reliability policies for new energy equipment, and incentives for intelligent manufacturing. Technological innovation is driven by high-efficiency power devices, the application of Gallium Nitride (GaN) and Silicon Carbide (SiC) components, digital power control, integrated high-density substrate materials, integrated thermal management solutions, and protection mechanisms. Meanwhile, evolving consumer demands are reflected in customers placing greater emphasis on high efficiency, low thermal loss, high power density, stability across wide temperature ranges, miniaturization, intelligent monitoring, electromagnetic compatibility, and long-term reliability.

Board-level AC-DC power supplies play a pivotal role in the power supply architectures of electronic systems. The market growth for these devices is driven both by the steady demand from foundational consumer electronics and by the industrial sector's continuous pursuit of highly reliable and efficient power solutions. Driven by multiple factors, particularly the telecommunications industry's evolution toward 5G and future 6G networks, the demand for enhanced power precision and stability in industrial automation control systems, the stringent safety standards required by rail transit systems, and the high certification thresholds for power supply reliability in medical electronics, board-level AC-DC power supplies are evolving beyond mere energy conversion units to become integral components of system-level power optimization designs. In 2025, the focus of industry competition will shift beyond simple power conversion efficiency to prioritize power density, thermal management performance, wide input voltage adaptability, intelligent diagnostic capabilities, and modular design flexibility. While leading international enterprises have accumulated years of technical expertise and brand reputation in the high-end markets for telecommunications, aerospace, and medical equipment power supplies, domestic Chinese suppliers are steadily gaining market share in sectors such as automation equipment, new energy

control systems, and mid-range telecommunications devices, leveraging their flexible manufacturing capabilities, rapid delivery speeds, and cost-control advantages. Technological innovation plays a pivotal role in driving industry upgrades; the adoption of high-performance Silicon Carbide (SiC) and Gallium Nitride (GaN) power devices has improved conversion efficiency and thermal stability, while integrated board designs and digital power control strategies have enhanced system reliability and remote operational maintenance capabilities. Concurrently, customer expectations regarding power solutions are continuously evolving, shifting from a past emphasis on basic power stability to a comprehensive evaluation of energy efficiency ratios, EMC performance, anti-interference capabilities, and health monitoring functions—a trend that is propelling board-level AC-DC power supplies to evolve from generic power modules into intelligent power supply platforms. The industry's future growth will be primarily driven by the Internet of Things (IoT), intelligent manufacturing, emerging applications in power electronics, and the digital transformation of infrastructure; however, the sector also faces challenges such as fluctuating raw material prices, lengthy certification cycles, and the significant divergence in requirements across different application domains. Overall, as a core module within electronic system power architectures, board-level AC-DC power supplies possess substantial potential for stable long-term growth and continued technological advancement.

This report studies the global Baseplate-Cooled AC-DC Power Supply production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Baseplate-Cooled AC-DC Power Supply 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 Baseplate-Cooled AC-DC Power Supply that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Baseplate-Cooled AC-DC Power Supply total production and demand, 2021-2032, (K Units)

Global Baseplate-Cooled AC-DC Power Supply total production value, 2021-2032, (USD Million)

Global Baseplate-Cooled AC-DC Power Supply production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Baseplate-Cooled AC-DC Power Supply consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Baseplate-Cooled AC-DC Power Supply domestic production, consumption, key domestic manufacturers and share

Global Baseplate-Cooled AC-DC Power Supply production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Baseplate-Cooled AC-DC Power Supply production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Baseplate-Cooled AC-DC Power Supply production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Baseplate-Cooled AC-DC Power Supply 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 TDK-Lambda (JP), CUI Inc (US), XP Power (GB), Recom (AT), Cosel (JP), Advanced Energy (US), BEL (US), Helios Power Solutions (SG), Fidus Power (GB), Relec Electronics (GB), 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 Baseplate-Cooled AC-DC Power Supply 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 Baseplate-Cooled AC-DC Power Supply Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Baseplate-Cooled AC-DC Power Supply Market, Segmentation by Type:

100-500W

500-1000W

1000-3000W

Other

Global Baseplate-Cooled AC-DC Power Supply Market, Segmentation by Output Type:

Single-phase Output

Multi-phase Output

Global Baseplate-Cooled AC-DC Power Supply Market, Segmentation by Efficiency:

Standard Type

High-Efficiency Type (>95%)

Global Baseplate-Cooled AC-DC Power Supply Market, Segmentation by Application:

Communication

Electronic

Medical

Other

Companies Profiled:

TDK-Lambda (JP)

CUI Inc (US)

XP Power (GB)

Recom (AT)

Cosel (JP)

Advanced Energy (US)

BEL (US)

Helios Power Solutions (SG)

Fidus Power (GB)

Relec Electronics (GB)

Fortec Group (DE)

ACT (US)

Enercon (IL)

P-DUKE (TW)

Advantech (TW)

Cincon (TW)

POWERGOOD (TW)

Delta (TW)

Mean Well (TW)

Key Questions Answered:

1. How big is the global Baseplate-Cooled AC-DC Power Supply market?
2. What is the demand of the global Baseplate-Cooled AC-DC Power Supply market?
3. What is the year over year growth of the global Baseplate-Cooled AC-DC Power Supply market?
4. What is the production and production value of the global Baseplate-Cooled AC-DC Power Supply market?
5. Who are the key producers in the global Baseplate-Cooled AC-DC Power Supply market?
6. What are the growth factors driving the market demand?

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