

Global Data Center Solid-State Transformer Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Data Center Solid-State Transformer market size is expected to reach \$ 700 million by 2032, rising at a market growth of 30.5% CAGR during the forecast period (2026-2032).

The Solid-State Transformer (SST) for data centers is a new type of power electronic device that replaces traditional power-frequency transformers. It achieves efficient power conversion and intelligent regulation based on fully controllable power electronic components and high-frequency magnetic coupling technology.

It not only provides voltage step-up/step-down and AC-DC conversion functions but also integrates reactive power compensation, harmonic mitigation, fault isolation, and multi-energy access capabilities, serving as the core component for building efficient, flexible, and green power supply and distribution systems in data centers. Its operating principle involves rectifying the input AC power into DC, performing voltage conversion through high-frequency isolation, and finally inverting it back to the required AC or DC voltage output. For example, a data center solid-state transformer can rectify a 10kV input voltage before inverting it to generate high-frequency AC voltage. This voltage is then stepped down to low-voltage high-frequency power via an internal miniature high-frequency transformer. Finally, a rear-end DC-AC converter outputs the required 400V, $\pm 400V$, or two-wire 800V power for the data center.

In 2025, global Data Center Solid-State Transformer production reached approximately 46.6MW with an average global market price of around 762 USD/KW. The production capacity for Data Center Solid-State Transformer in 2025 was approximately 50MW. The typical gross profit margin for Data Center Solid-State Transformer is between 20% and 40%.

Development Trends

Continuously Improving Efficiency: With ongoing advancements in power semiconductor devices and control technologies, the efficiency of data center solid-state transformers will further increase, promising higher energy efficiency levels.

Increasing Power Density: Through the adoption of new materials and optimized designs, the volume and weight of solid-state transformers will continue to decrease while power density steadily increases, meeting the growing high-power-density demands of data centers.

Enhanced Intelligence: Equipped with stronger intelligent operation and maintenance capabilities, these transformers enable real-time power flow optimization and self-healing from faults, improving the reliability and stability of data center power supply systems.

Growth Drivers

Policy Impulsion: Global initiatives like the “dual carbon” goals and the “East Data West Computing” project impose stringent PUE requirements on data centers, driving rapid growth in market demand for solid-state transformers.

Market Demand Expansion: Exponential growth in AI computing power demands higher efficiency and redundancy from data center power systems. As a key solution to power challenges, solid-state transformers will see continuously expanding market demand.

Technological Advancements: Continuous progress in power semiconductors, high-frequency magnetic coupling, and related technologies will reduce solid-state transformer costs while enhancing performance and reliability, accelerating market adoption and application.

Upstream and Downstream Influence Drivers

Upstream Influence Drivers: Technological advancements and cost reductions in upstream industries like power semiconductors, magnetic components, and materials will provide robust support for the development of data center solid-state transformers. For instance, improved performance and reduced costs of silicon carbide (SiC) devices will drive solid-state transformers toward higher efficiency and greater power density.

Downstream Impact Drivers: The rapid expansion of downstream sectors like data centers and renewable energy imposes heightened demands on power supply efficiency, flexibility, and reliability, directly stimulating market demand for data center solid-state transformers. For instance, the continuous increase in per-cabinet power consumption within data centers necessitates more efficient power delivery equipment, making solid-state transformers a key technology for achieving this objective.

This report studies the global Data Center Solid-State Transformer production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Data Center Solid-State Transformer 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 Data Center Solid-State Transformer that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Data Center Solid-State Transformer total production and demand, 2021-2032, (MW)

Global Data Center Solid-State Transformer total production value, 2021-2032, (USD Million)

Global Data Center Solid-State Transformer production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (MW), (based on production site)

Global Data Center Solid-State Transformer consumption by region & country, CAGR, 2021-2032 & (MW)

U.S. VS China: Data Center Solid-State Transformer domestic production, consumption, key domestic manufacturers and share

Global Data Center Solid-State Transformer production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (MW)

Global Data Center Solid-State Transformer production by Type, production, value, CAGR, 2021-2032, (USD Million) & (MW)

Global Data Center Solid-State Transformer production by Application, production, value, CAGR, 2021-2032, (USD Million) & (MW)

This report profiles key players in the global Data Center Solid-State Transformer 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 Eaton, Delta, Amperesand,

SolarEdge, Vertiv, TBEA, China XD Electric, JST Power Equipment, Newonder Special Electric, TGOOD Electric, 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 Data Center Solid-State Transformer market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (MW) and average price (US\$/KW) 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 Data Center Solid-State Transformer Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Data Center Solid-State Transformer Market, Segmentation by Type:

Single-port SST

Multi-port SST

Global Data Center Solid-State Transformer Market, Segmentation by Input Method:

AC-DC

DC-DC

Global Data Center Solid-State Transformer Market, Segmentation by Semiconductor Devices:

IGBT SST

SiC MOSFET SST

Global Data Center Solid-State Transformer Market, Segmentation by Application:

Enterprise Data Centers

Housing and Service Provider Data Centers

Hyperscale Data Centers

Companies Profiled:

Eaton

Delta

Amperesand

SolarEdge

Vertiv

TBEA

China XD Electric

JST Power Equipment

Newonder Special Electric

TGOOD Electric

Sifang Automation

Kehua

Schneider Electric

Kerun Intelligent Control

Eaglerise

WG Energy

Key Questions Answered:

1. How big is the global Data Center Solid-State Transformer market?
2. What is the demand of the global Data Center Solid-State Transformer market?
3. What is the year over year growth of the global Data Center Solid-State Transformer market?
4. What is the production and production value of the global Data Center Solid-State Transformer market?
5. Who are the key producers in the global Data Center Solid-State Transformer market?
6. What are the growth factors driving the market demand?

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