

Global Data Center Solid-State Transformer 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 Data Center Solid-State Transformer market size was valued at US\$ 36.53 million in 2025 and is forecast to a readjusted size of US\$ 700 million by 2032 with a CAGR of 30.5% during review period.

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 is a detailed and comprehensive analysis for global Data Center Solid-State Transformer 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 Data Center Solid-State Transformer market size and forecasts, in consumption value (\$ Million), sales quantity (MW), and average selling prices (US\$/KW), 2021-2032

Global Data Center Solid-State Transformer market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (MW), and average selling prices (US\$/KW), 2021-2032

Global Data Center Solid-State Transformer market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (MW), and average selling prices (US\$/KW), 2021-2032

Global Data Center Solid-State Transformer market shares of main players, shipments in revenue (\$ Million), sales quantity (MW), and ASP (US\$/KW), 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 Data Center Solid-State Transformer

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 Data Center Solid-State Transformer 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 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.

Market Segmentation

Data Center Solid-State Transformer 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

Single-port SST

Multi-port SST

Market segment by Input Method

AC-DC

DC-DC

Market segment by Semiconductor Devices

IGBT SST

SiC MOSFET SST

Market segment by Application

Enterprise Data Centers

Housing and Service Provider Data Centers

Hyperscale Data Centers

Major players covered

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

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 Data Center Solid-State Transformer product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Data Center Solid-State Transformer, with price, sales quantity, revenue, and global market share of Data Center Solid-State Transformer from 2021 to 2026.

Chapter 3, the Data Center Solid-State Transformer competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Data Center Solid-State Transformer 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 Data Center Solid-State Transformer 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 Data Center Solid-State Transformer.

Chapter 14 and 15, to describe Data Center Solid-State Transformer sales channel, distributors, customers, research findings and conclusion.

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