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Global GaN Power Devices for AI Server Power Supplies Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global GaN Power Devices for AI Server Power Supplies market size is expected to reach $ 447 million by 2032, rising at a market growth of 29.8% CAGR during the forecast period (2026-2032).

GaN power devices for AI server power supplies are gallium nitride power semiconductors used in AI server PSUs and high-density power-delivery architectures, primarily including discrete GaN FETs, driver-integrated GaN power stages, and GaN power ICs. These devices are deployed in power-factor-correction stages, LLC and isolated DC-DC conversion, 48 V/54 V intermediate-bus conversion, and auxiliary power, where high switching frequency, low switching loss, and negligible reverse-recovery loss support higher conversion efficiency and power density in high-power CRPS and OCP server supplies. Mainstream high-voltage products are currently concentrated around the 600–700 V class, while 100–150 V devices address 48 V bus-related DC-DC stages; higher-voltage GaN devices for emerging 800 V DC architectures are moving through development and qualification. This market focuses on GaN power semiconductors sold as key switching devices for AI server power supplies serving cloud, colocation, enterprise, telecom, and research data centers. The blended gross margin is approximately 45%.

Market Trends

Rising accelerator power, GPU density, and rack-level loading are moving server power supplies beyond conventional 3 kW designs toward 4.5–8.5 kW and higher power-density platforms. GaN is therefore shifting from an efficiency-only proposition to a

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system-level tool for shrinking magnetics, reducing PSU volume, and improving high-frequency transient response. The 650 V class remains central to high-frequency isolated DC-DC stages, while 100–150 V devices are gaining relevance in 48 V/54 V bus architectures. Higher-voltage GaN aimed at emerging 800 V DC systems represents the next technology extension as AI infrastructure moves toward megawatt-scale racks.

Drivers

Higher AI accelerator power is lifting PSU output and power-density requirements, while data-center operators and power-supply vendors continue to target stringent efficiency levels such as 80 PLUS Titanium and Ruby and lower facility PUE. GaN can reduce switching losses at high frequency and enable smaller magnetic components, allowing PSU designers to raise rated power within established CRPS and OCP form factors. This makes GaN an increasingly important upgrade path for dense AI server power systems.

Restraints

GaN still carries higher device cost, more demanding gate-drive and EMI design requirements, thermal-management constraints, and longer mission-profile qualification than mature silicon solutions. At higher voltage and power levels, designers must also balance GaN against SiC on efficiency, robustness, and system cost. Optimized superjunction MOSFETs remain economically attractive in some lower-power server supplies, so adoption is progressing by topology and power stage rather than through uniform replacement.

Opportunities

PSUs above 4.5 kW, OCP power shelves, and 48 V/54 V intermediate-bus conversion are the clearest near-term growth areas. As AI racks move toward several hundred kilowatts and beyond, 800 V DC architectures could create new demand for GaN above the conventional 650 V class, more integrated power stages, and auxiliary-power ICs. Top-side or dual-side thermal designs and higher functional integration also offer suppliers a route to increase device value while reducing component count and cooling-system volume.

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Challenges

AI server architectures are evolving rapidly, and PSU voltage, output power, form factor, and topology standards are not yet static. Device suppliers must simultaneously meet efficiency, reliability, short-circuit robustness, thermal performance, and supply-security expectations. If SiC develops a stronger cost-performance position in the main conversion stages of 800 V architectures, GaN may remain concentrated in lower-voltage and higher-frequency stages. Wafer capacity, advanced packaging availability, and lengthy customer qualification can also constrain ramp speed for new suppliers.

Industry Chain Analysis

The upstream chain includes GaN epitaxy, silicon or alternative substrates, wafer processing, metals and packaging materials, and supporting driver and control ICs. The midstream combines GaN IDMs, fabless device designers, foundry partners, and outsourced assembly and test providers to manufacture discrete devices, power stages, and integrated power ICs. Downstream, these components enter server PSU, power-module, and power-architecture manufacturers before being deployed in AI servers and rack systems across cloud, colocation, enterprise, telecom, and research data centers. Value creation is increasingly shifting from transistor-level figures of merit toward co-optimization of device, driver, package thermal path, PCB layout, control, and reference design, especially in high-power-density platforms.

Segment Insights

By voltage and product form, 650 V discrete devices and driver-integrated power stages currently form the core of the high-voltage market, particularly in high-frequency LLC and related conversion stages. Low-voltage 100–150 V GaN is growing faster in 48 V bus conversion where current density and switching frequency are critical. Integrated GaN power stages and power ICs are gaining share because integrated drivers, protection, and sensing reduce parasitics and design complexity. Higher-voltage GaN remains an emerging segment but has increasing strategic relevance as 800 V DC architectures develop.

Downstream Market Opportunities

Hyperscale cloud data centers are the strongest demand source because procurement

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decisions place heavy weight on rack power, energy efficiency, serviceability, and secure high-volume supply. Colocation operators are another growth channel as AI compute leasing drives denser cabinets and higher power per rack. Enterprise, telecom, government, and research deployments are adopting at a steadier pace with greater emphasis on reliability and lifecycle cost. Suppliers that can address both high-voltage PSU stages and 48 V-class conversion while providing complete reference designs are better positioned for large power-platform qualifications.

Regional Insights

North America is one of the most concentrated demand centers for AI servers and hyperscale data-center construction and is an early driver of high-power CRPS/OCP supplies and emerging 800 V architectures. Asia-Pacific has a strong manufacturing position across GaN wafer processing, packaging, server PSU ODMs, and AI server system supply chains, with China, Japan, South Korea, and Taiwan serving as major production hubs. Europe is smaller in downstream volume but remains important in power-semiconductor technology, specialized GaN suppliers, and high-efficiency power-conversion engineering.

Competitive Landscape Analysis

Competition is developing between diversified power-semiconductor vendors and specialist GaN suppliers. Large integrated vendors leverage wafer manufacturing, packaging, driver and controller portfolios, reference designs, and global account support, while focused GaN companies compete through lower on-resistance, greater integration, proprietary thermal packages, and high-frequency system expertise. As AI PSU customers move from evaluating individual transistors toward validating complete power-stage efficiency, thermals, EMI, reliability, and manufacturability, competitive advantage increasingly depends on system-level engineering support, production consistency, qualification track record, and long-term supply capability rather than device specifications alone.

Report Scope

This report studies the global GaN Power Devices for AI Server Power Supplies production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global GaN Power Devices for AI Server Power Supplies total production and demand, 2021-2032, (K Units)

Global GaN Power Devices for AI Server Power Supplies total production value, 2021-2032, (USD Million)

Global GaN Power Devices for AI Server Power Supplies production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global GaN Power Devices for AI Server Power Supplies consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: GaN Power Devices for AI Server Power Supplies domestic production, consumption, key domestic manufacturers and share

Global GaN Power Devices for AI Server Power Supplies production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global GaN Power Devices for AI Server Power Supplies production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global GaN Power Devices for AI Server Power Supplies production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global GaN Power Devices for AI Server Power

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Supplies 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 Infineon Technologies, Navitas Semiconductor, Innoscience, Renesas Electronics, Texas Instruments, Nexperia, ROHM, STMicroelectronics, Efficient Power Conversion, Cambridge GaN Devices, 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 GaN Power Devices for AI Server Power Supplies 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 GaN Power Devices for AI Server Power Supplies Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

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Rest of World

Market Segmentation

Global GaN Power Devices for AI Server Power Supplies Market, Segmentation by Type:

Discrete GaN FETs

Integrated GaN Power Stages

GaN Power ICs

Global GaN Power Devices for AI Server Power Supplies Market, Segmentation by Voltage Rating:

?150 V

151–650 V

651–1200 V

>1200 V

Global GaN Power Devices for AI Server Power Supplies Market, Segmentation by On-Resistance:

?20 m?

>20–50 m?

>50–100 m?

>100 m?

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Global GaN Power Devices for AI Server Power Supplies Market, Segmentation by Application:

Cloud and Colocation

Government and Research

Telecom

Others

Companies Profiled:

Infineon Technologies

Navitas Semiconductor

Innoscience

Renesas Electronics

Texas Instruments

Nexperia

ROHM

STMicroelectronics

Efficient Power Conversion

Cambridge GaN Devices

Power Integrations

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Alpha and Omega Semiconductor

Wise Integration

Key Questions Answered

1. How big is the global GaN Power Devices for AI Server Power Supplies market?
2. What is the demand of the global GaN Power Devices for AI Server Power Supplies market?
3. What is the year over year growth of the global GaN Power Devices for AI Server Power Supplies market?
4. What is the total value of the global GaN Power Devices for AI Server Power Supplies market?
5. Who are the Major Players in the global GaN Power Devices for AI Server Power Supplies market?
6. What are the growth factors driving the market demand?

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