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Global GaN Power Devices for AI Server Power Supplies 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 GaN Power Devices for AI Server Power Supplies market size was valued at US$ 63.79 million in 2025 and is forecast to a readjusted size of US$ 447 million by 2032 with a CAGR of 29.8% during review period.

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-

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density platforms. GaN is therefore shifting from an efficiency-only proposition to a 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

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Hyperscale cloud data centers are the strongest demand source because procurement 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 is a detailed and comprehensive analysis for global GaN Power Devices for

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AI Server Power Supplies 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 GaN Power Devices for AI Server Power Supplies market size and forecasts, in consumption value ($ Million), sales quantity (K Units), and average selling prices (US$/Unit), 2021-2032

Global GaN Power Devices for AI Server Power Supplies market size and forecasts by region and country, in consumption value ($ Million), sales quantity (K Units), and average selling prices (US$/Unit), 2021-2032

Global GaN Power Devices for AI Server Power Supplies market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (K Units), and average selling prices (US$/Unit), 2021-2032

Global GaN Power Devices for AI Server Power Supplies market shares of main players, shipments in revenue ($ Million), sales quantity (K 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 GaN Power Devices for AI Server Power Supplies

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

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

GaN Power Devices for AI Server Power Supplies 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 Segmentation

Market segment by Type

Discrete GaN FETs

Integrated GaN Power Stages

GaN Power ICs

Market segment by Voltage Rating

?150 V

151–650 V

651–1200 V

>1200 V

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Market segment by On-Resistance

?20 m?

>20–50 m?

>50–100 m?

>100 m?

Market segment by Application

Cloud and Colocation

Government and Research

Telecom

Others

Major players covered

Infineon Technologies

Navitas Semiconductor

Innoscience

Renesas Electronics

Texas Instruments

Nexperia

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ROHM

STMicroelectronics

Efficient Power Conversion

Cambridge GaN Devices

Power Integrations

Alpha and Omega Semiconductor

Wise Integration

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)

Chapter Outline

Chapter 1, to describe GaN Power Devices for AI Server Power Supplies product scope, market overview, market estimation caveats and base year.
Chapter 2, to profile the top manufacturers of GaN Power Devices for AI Server Power Supplies, with price, sales quantity, revenue, and global market share of GaN Power Devices for AI Server Power Supplies from 2021 to 2026.
Chapter 3, the GaN Power Devices for AI Server Power Supplies competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed

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emphatically by landscape contrast.
Chapter 4, the GaN Power Devices for AI Server Power Supplies 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 GaN Power Devices for AI Server Power Supplies 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 GaN Power Devices for AI Server Power Supplies.
Chapter 14 and 15, to describe GaN Power Devices for AI Server Power Supplies sales channel, distributors, customers, research findings and conclusion.

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(2021-2032)

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