

Global High-Density Busbars for AI Server Racks 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 High-Density Busbars for AI Server Racks market size was valued at US\$ 839 million in 2025 and is forecast to a readjusted size of US\$ 1718 million by 2032 with a CAGR of 8.4% during review period.

High-density busbars for AI server racks are high-current power distribution components designed for artificial intelligence training servers, high-performance computing clusters, open compute racks, and high-power data center infrastructure. They are typically composed of copper, aluminum, or copper-aluminum composite conductors, insulating media, surface plating, connection terminals, support structures, tap-off units, monitoring modules, and optional liquid-cooling channels. Their core function is to transfer power from power shelves, battery backup units, rectifier modules, rack busways, or upstream power distribution systems to GPU servers, switches, storage equipment, and power modules within a limited rack footprint with lower resistance, lower voltage drop, fewer cables, and more stable temperature rise. These products mainly address the challenges caused by the rapid increase in AI rack power density, including excessive space occupied by traditional cable routing, numerous connection points, high thermal pressure, low maintenance efficiency, and insufficient scalability. Their technical approaches include OCP DC busbars, laminated low-inductance busbars, open-track busways, hot-swappable tap-off boxes, blind-mate connections, thick-copper busbar PCBs, liquid-cooled integrated busbars, and intelligent monitored busway systems. Typical customers include cloud computing operators, AI data center owners, server OEMs, rack manufacturers, power distribution system integrators, and high-performance computing centers.

The industrial value of high-density busbars for AI server racks is shifting from conventional conductive components to critical structural elements of high-power rack architectures. As GPU servers, AI accelerators, and high-performance switching equipment move into higher power-density ranges, rack-level power delivery is no longer limited to basic power access. It must simultaneously support high-current transmission, low voltage drop, temperature-rise control, rapid maintenance, and scalable deployment within a constrained footprint. Traditional cable-based solutions are increasingly limited by the number of connection points, routing complexity, airflow occupation, and maintenance burden. Busbars standardize the power path through rigid conductors, laminated structures, open tracks, DC backplanes, and tap-off modules, creating shorter, more stable, and more serviceable power channels between power shelves, battery backup units, rectifier modules, and IT equipment. In the future, high-density busbars will become integrated infrastructure elements combined with rack structures, liquid-cooling systems, power shelves, monitoring units, and OCP standards.

Technology development is progressing along three main routes. The first is the OCP rack DC busbar route, centered on 48 V DC power delivery, rear-rack direct contact, blind-mate connection, and standardized rack dimensions, primarily serving hyperscale cloud operators and AI training clusters. The second is the data center row-level busway route, centered on open tracks, hot-swappable tap-off boxes, monitoring modules, and modular installation, primarily serving white-space power distribution, rack expansion, and data center retrofit projects. The third is the equipment-level laminated busbar and liquid-cooled busbar route, centered on low inductance, multilayer insulation, compact structure, and thermal management, primarily serving power modules, internal server power distribution, power conversion, and high-power electronic components. These three routes differ in customers, certification requirements, processes, and delivery models, but they all point toward higher power density, fewer cables, improved cooling, and greater reliability, which will continue to elevate the strategic position of busbars in the AI data center supply chain.

The competitive landscape will combine globalization with customization. European and American companies have accumulated strong capabilities in data center busways, laminated busbars, low-voltage power distribution systems, and international certification, making them well positioned for large cloud data center, colocation, and multinational customer projects. Asian companies have advantages in rack manufacturing, cable and connector assemblies, electronics manufacturing, data center system integration, and rapid customization, enabling incremental opportunities around OCP racks, liquid-cooled cabinets, and localized AI data center construction. Because AI data centers are highly sensitive to reliability, safety, and downtime risk, customer

selection will place greater emphasis on current-carrying capacity, temperature-rise validation, short-circuit withstand capability, insulation reliability, mating life, certification systems, and supply chain stability. Over the next few years, the growth potential of high-density busbars will be driven by AI computing investment, penetration of 48 V DC architectures, adoption of liquid-cooled cabinets, and prefabricated data center power distribution, while the industry remains in a phase of simultaneous demand expansion and technology upgrading.

This report is a detailed and comprehensive analysis for global High-Density Busbars for AI Server Racks market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Conductive Material 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 High-Density Busbars for AI Server Racks market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global High-Density Busbars for AI Server Racks market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global High-Density Busbars for AI Server Racks market size and forecasts, by Conductive Material and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global High-Density Busbars for AI Server Racks market shares of main players, shipments in revenue (\$ Million), sales quantity (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 High-Density Busbars for AI Server Racks

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 High-Density Busbars for AI Server Racks 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 Molex, LLC, BizLink Holding Inc., TE Connectivity Ltd., Mersen S.A., Rogers Corporation, Rittal GmbH & Co. KG, Vertiv Holdings Co., Legrand SA, Schneider Electric SE, Siemens AG, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

High-Density Busbars for AI Server Racks market is split by Conductive Material and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Conductive Material, 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 Conductive Material

Copper Conductor

Aluminum Conductor

Other

Market segment by Cooling Method

Natural Heat Dissipation

Enclosure Heat Dissipation

Integrated Liquid Cooling

Market segment by Rated Current

Below 300 A

300 A to 800 A

800 A to 1,400 A

Above 1,400 A

Market segment by Application

AI Training Racks

High-Performance Computing Racks

Cloud Data Center Racks

Other

Major players covered

Molex, LLC

BizLink Holding Inc.

TE Connectivity Ltd.

Mersen S.A.

Rogers Corporation

Rittal GmbH & Co. KG

Vertiv Holdings Co.

Legrand SA

Schneider Electric SE

Siemens AG

Eaton Corporation plc

ABB Ltd

LS Cable & System Ltd.

Delta Electronics, Inc.

EAE Elektrik A.?.

Electris Sp. z o.o.

Storm Power Components

Kyoei Denshi Co., Ltd.

YSOL Co., Ltd.

Shinohara Electric Co., Ltd.

Hengtong Optic-Electric Co., Ltd.

Shenzhen Clever Electronic Co., Ltd.

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 High-Density Busbars for AI Server Racks product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of High-Density Busbars for AI Server Racks, with price, sales quantity, revenue, and global market share of High-Density Busbars for AI Server Racks from 2021 to 2026.

Chapter 3, the High-Density Busbars for AI Server Racks competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the High-Density Busbars for AI Server Racks 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 Conductive Material and by Application, with sales market share and growth rate by Conductive Material, 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 High-Density Busbars for AI Server Racks market forecast, by regions, by Conductive Material, 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 High-Density Busbars for AI Server Racks.

Chapter 14 and 15, to describe High-Density Busbars for AI Server Racks sales channel, distributors, customers, research findings and conclusion.

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