

Global High-Density Busbars for AI Server Racks Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global High-Density Busbars for AI Server Racks market size is expected to reach \$ 1718 million by 2032, rising at a market growth of 8.4% CAGR during the forecast period (2026-2032).

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 studies the global High-Density Busbars for AI Server Racks production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for High-Density Busbars for AI Server Racks 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 High-Density Busbars for AI Server Racks that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global High-Density Busbars for AI Server Racks total production and demand, 2021-2032, (Units)

Global High-Density Busbars for AI Server Racks total production value, 2021-2032, (USD Million)

Global High-Density Busbars for AI Server Racks production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global High-Density Busbars for AI Server Racks consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: High-Density Busbars for AI Server Racks domestic production, consumption, key domestic manufacturers and share

Global High-Density Busbars for AI Server Racks production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global High-Density Busbars for AI Server Racks production by Conductive Material, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global High-Density Busbars for AI Server Racks production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global High-Density Busbars for AI Server Racks 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World High-Density Busbars for AI Server Racks market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Conductive Material, 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 High-Density Busbars for AI Server Racks Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global High-Density Busbars for AI Server Racks Market, Segmentation by Conductive Material:

Copper Conductor

Aluminum Conductor

Other

Global High-Density Busbars for AI Server Racks Market, Segmentation by Cooling Method:

Natural Heat Dissipation

Enclosure Heat Dissipation

Integrated Liquid Cooling

Global High-Density Busbars for AI Server Racks Market, Segmentation by Rated Current:

Below 300 A

300 A to 800 A

800 A to 1,400 A

Above 1,400 A

Global High-Density Busbars for AI Server Racks Market, Segmentation by Application:

AI Training Racks

High-Performance Computing Racks

Cloud Data Center Racks

Other

Companies Profiled:

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.

Key Questions Answered:

1. How big is the global High-Density Busbars for AI Server Racks market?
2. What is the demand of the global High-Density Busbars for AI Server Racks market?
3. What is the year over year growth of the global High-Density Busbars for AI Server Racks market?
4. What is the production and production value of the global High-Density Busbars for AI Server Racks market?
5. Who are the key producers in the global High-Density Busbars for AI Server Racks market?
6. What are the growth factors driving the market demand?

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