

Global High-Frequency Magnetic Components for SSTs Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global High-Frequency Magnetic Components for SSTs market size is expected to reach \$ 134 million by 2032, rising at a market growth of 15.1% CAGR during the forecast period (2026-2032).

High-frequency magnetic components for solid-state transformers (SSTs) are custom magnetic devices installed in the SST power-conversion chain to provide galvanic isolation, energy transfer, resonance, energy storage, and filtering at switching frequencies ranging from several kilohertz to hundreds of kilohertz. Major product forms include medium-/high-frequency isolation transformers, resonant inductors, filter inductors, auxiliary transformers, and integrated magnetics. These components are typically designed for DAB, LLC, and modular power-conversion stages. Key procurement specifications include rated power, operating frequency, insulation withstand voltage, partial-discharge performance, leakage inductance, core and winding losses, temperature rise, and power density. Ferrite, nanocrystalline, and amorphous soft-magnetic materials are commonly used. Major downstream SST systems include AI data centers, EV charging infrastructure, renewable energy, battery storage, and grid applications. Products are generally highly customized and frequently co-developed with system OEMs. The market-level blended gross margin is estimated at about 35%.

Market Trends

SST magnetics are moving from conventional wound components toward higher switching frequency, higher insulation voltage, greater power density, and tighter system-level co-design. As wide-bandgap devices such as SiC raise switching frequencies, core loss, winding skin and proximity effects, parasitic capacitance, and

insulation electric-field distribution become simultaneous design constraints. This is accelerating adoption of sectionalized windings, litz-wire or copper-foil conductors, planar structures, low-capacitance designs, and more sophisticated air, cold-plate, or liquid-cooling interfaces. Parameter coordination between the main transformer and resonant inductors is also becoming more important, while integrated magnetics can reduce component count and increase power density in selected modular DAB and resonant architectures.

Drivers

Demand for high-density AI data-center power architectures, higher-power fast-charging infrastructure, bidirectional power flow in solar-plus-storage systems, and digital grid modernization is expanding the commercial use cases for SSTs. High-frequency isolation allows SSTs to connect directly to medium-voltage systems while coordinating with DC buses, energy storage, and distributed energy resources, creating incremental demand for medium-/high-frequency isolation transformers, reactors, and auxiliary magnetic components.

Restraints

High-frequency SST magnetics remain highly customized. Differences in converter topology, bus voltage, power-module count, cooling method, and insulation architecture can materially change the magnetic circuit and winding design. The cost of high-voltage insulation systems, nanocrystalline cores, copper, and high-frequency conductors, combined with partial-discharge, temperature-rise, dielectric, and lifetime validation, extends the development cycle from prototype to production and limits near-term economies of scale.

Opportunities

Next-generation SST platforms for 800 VDC data centers, megawatt charging, modular energy storage, and medium-voltage DC microgrids are creating new design windows for high-power-density MFTs and integrated magnetics. Suppliers that can combine electromagnetic, insulation, thermal, and mechanical simulation are better positioned to enter co-development programs with system OEMs. As modular power stages become more standardized, reusable magnetic subassemblies can improve design repeatability and expand volume-manufacturing opportunities.

Challenges

The industry still supports multiple competing architectures, and DAB, LLC, and multilevel approaches impose different frequency, leakage-inductance, and isolation requirements. A unified product specification framework has not yet emerged. Delays in downstream SST projects, insufficient system-level efficiency gains relative to added cost, or failure to meet utility and data-center reliability requirements could slow order conversion. Suppliers must also balance power density, losses, temperature rise, partial-discharge margin, and manufacturing consistency over long operating lifetimes.

Industry Chain Analysis

Upstream inputs include ferrite, nanocrystalline, and amorphous cores; magnet wire, litz wire, and copper foil; and insulation films, bobbins, encapsulation resins, thermal materials, and cooling structures. Midstream manufacturers perform magnetic and winding design, insulation-system engineering, thermal simulation, prototyping, and dielectric, partial-discharge, and temperature-rise validation. Downstream customers include SST OEMs, power-electronics system integrators, and equipment supply chains serving data centers, charging, energy storage, renewable energy, and grid applications. Value creation is concentrated in high-voltage insulation design, low-loss magnetic circuits, parasitic-parameter control, and repeatable manufacturing rather than in simple material conversion, which supports stronger positioning for suppliers with co-design and automated test capability.

Segment Insights

By component type, the medium-/high-frequency isolation transformer is the core magnetic element for galvanic isolation and energy transfer between SST voltage domains, and generally carries higher technical complexity and unit value than auxiliary magnetics. Resonant and filter inductors are configured according to converter topology and module design. By frequency and core material, nanocrystalline and amorphous alloys are attractive in lower-to-mid tens-of-kilohertz designs where high flux density and low loss are important, while ferrites are widely used at higher frequencies and modular power levels. Planar and integrated magnetic structures should become more relevant as switching frequency and packaging density increase.

Downstream Market Opportunities

AI data centers are the most visible emerging demand opportunity because medium-voltage input, 800 VDC distribution, and high-density rack power create system value for SST architectures that reduce conventional conversion stages and electrical-room footprint. Ultra-fast EV charging, photovoltaic systems, battery storage, and microgrids place greater emphasis on bidirectional power flow, DC coupling, and flexible voltage regulation. Magnetic suppliers with reusable platforms for high-voltage isolation, high power density, and rigorous reliability validation can address several downstream markets and reduce dependence on a single application cycle.

Regional Insights

Asia-Pacific combines a broad soft-magnetic-material base with dense winding and power-electronics manufacturing capabilities. Chinese suppliers are accelerating development and demonstration of SST-specific high-frequency transformers for data-center and new-energy applications, while Japanese suppliers retain strong capabilities in advanced magnetic materials and medium-frequency transformer development. Europe has established engineering expertise in railway, industrial power electronics, smart-grid systems, and customized medium-frequency magnetics, with Germany hosting several specialized suppliers. North American opportunities are increasingly linked to AI data-center infrastructure, grid expansion, and investment in new power-electronic architectures, which can stimulate demand for high-end customized magnetics.

Competitive Landscape Analysis

Competition remains project-driven and customization-intensive. The principal differentiators are not the number of catalog products, but the ability to optimize high-voltage insulation, partial-discharge performance, losses, parasitic parameters, thermal management, and manufacturability as a complete system. Mentech and Jingquanhua have presented dedicated medium-/high-frequency transformer solutions for SST applications, while Sumida has publicly showcased SST-related and MW-class high-power magnetics. BLOCK, STS, Payton, Mdexx, Schmidbauer, Bourns, Eaglerise, and Agile Magnetics provide established capabilities in medium-/high-frequency

transformers, inductors, or custom power magnetics that can address adjacent SST requirements. As SST platforms move from prototype validation toward repeatable architectures, suppliers with strong high-voltage testing, rapid prototyping, and stable volume manufacturing are better positioned to become long-term development and supply partners.

Report Scope

This report studies the global High-Frequency Magnetic Components for SSTs production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for High-Frequency Magnetic Components for SSTs 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-Frequency Magnetic Components for SSTs that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global High-Frequency Magnetic Components for SSTs total production and demand, 2021-2032, (K Units)

Global High-Frequency Magnetic Components for SSTs total production value, 2021-2032, (USD Million)

Global High-Frequency Magnetic Components for SSTs production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global High-Frequency Magnetic Components for SSTs consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: High-Frequency Magnetic Components for SSTs domestic production, consumption, key domestic manufacturers and share

Global High-Frequency Magnetic Components for SSTs production by

manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global High-Frequency Magnetic Components for SSTs production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global High-Frequency Magnetic Components for SSTs production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global High-Frequency Magnetic Components for SSTs 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 Mentech, Jingquanhua, Eaglerise, Sumida, BLOCK, STS, Payton, Mdexx, Schmidbauer, Bourns, 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-Frequency Magnetic Components for SSTs 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 High-Frequency Magnetic Components for SSTs Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global High-Frequency Magnetic Components for SSTs Market, Segmentation by Type:

Isolation Transformers

Resonant Inductors

Filter Inductors

Auxiliary Transformers

Integrated Magnetics

Others

Global High-Frequency Magnetic Components for SSTs Market, Segmentation by Rated Power:

Below 10 kW

10—<50 kW

50—<100 kW

100—<250 kW

250—<500 kW

500 kW and Above

Global High-Frequency Magnetic Components for SSTs Market, Segmentation by Operating Frequency:

Below 10 kHz

10—<50 kHz

50—<100 kHz

100—<200 kHz

200 kHz and Above

Global High-Frequency Magnetic Components for SSTs Market, Segmentation by Core Material:

Ferrite

Nanocrystalline Alloy

Amorphous Alloy

Powder Core

Hybrid Core

Other Core Materials

Global High-Frequency Magnetic Components for SSTs Market, Segmentation by Application:

Data Centers

EV Charging

Renewable Energy

Energy Storage

Power Grid

Others

Companies Profiled:

Mentech

Jingquanhua

Eaglerise

Sumida

BLOCK

STS

Payton

Mdexx

Schmidbauer

Bourns

Agile Magnetics

Key Questions Answered

1. How big is the global High-Frequency Magnetic Components for SSTs market?
2. What is the demand of the global High-Frequency Magnetic Components for SSTs market?
3. What is the year over year growth of the global High-Frequency Magnetic Components for SSTs market?
4. What is the total value of the global High-Frequency Magnetic Components for SSTs market?
5. Who are the Major Players in the global High-Frequency Magnetic Components for SSTs market?
6. What are the growth factors driving the market demand?

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