

Global High-Frequency Magnetic Components for SSTs 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-Frequency Magnetic Components for SSTs market size was valued at US\$ 49.39 million in 2025 and is forecast to a readjusted size of US\$ 134 million by 2032 with a CAGR of 15.1% during review period.

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 is a detailed and comprehensive analysis for global High-Frequency Magnetic Components for SSTs 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 High-Frequency Magnetic Components for SSTs market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global High-Frequency Magnetic Components for SSTs 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 High-Frequency Magnetic Components for SSTs 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 High-Frequency Magnetic Components for SSTs 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:

Global High-Frequency Magnetic Components for SSTs Market 2026 by Manufacturers, Regions, Type and Application...

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for High-Frequency Magnetic Components for SSTs

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-Frequency Magnetic Components for SSTs 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 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.

High-Frequency Magnetic Components for SSTs 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

Isolation Transformers

Resonant Inductors

Filter Inductors

Auxiliary Transformers

Integrated Magnetics

Others

Market segment by Rated Power

Below 10 kW

10–<50 kW

50–<100 kW

100–<250 kW

250–<500 kW

500 kW and Above

Market segment by Operating Frequency

Below 10 kHz

10–<50 kHz

50–<100 kHz

100–<200 kHz

200 kHz and Above

Market segment by Core Material

Ferrite

Nanocrystalline Alloy

Amorphous Alloy

Powder Core

Hybrid Core

Other Core Materials

Market segment by Application

Data Centers

EV Charging

Renewable Energy

Energy Storage

Power Grid

Others

Major players covered

Mentech

Jingquanhua

Eaglerise

Sumida

BLOCK

STS

Payton

Mdexx

Schmidbauer

Bourns

Agile Magnetics

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 High-Frequency Magnetic Components for SSTs product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of High-Frequency Magnetic Components for SSTs, with price, sales quantity, revenue, and global market share of High-Frequency Magnetic Components for SSTs from 2021 to 2026.

Chapter 3, the High-Frequency Magnetic Components for SSTs competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the High-Frequency Magnetic Components for SSTs 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 High-Frequency Magnetic Components for SSTs 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 High-Frequency Magnetic Components for SSTs.

Chapter 14 and 15, to describe High-Frequency Magnetic Components for SSTs sales channel, distributors, customers, research findings and conclusion.

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