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# Global Military Grade COTS Power Supply Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Military Grade COTS Power Supply market size is expected to reach $ 2208 million by 2032, rising at a market growth of 6.6% CAGR during the forecast period (2026-2032).

Military Grade COTS Power Supply refers to commercially available off-the-shelf power-conversion equipment that is designed, ruggedized, screened or qualified for integration into military and defense electronic systems while avoiding the development cycle of a fully application-specific power supply. Typical products include AC-DC power supplies, DC-DC converters, VITA 62/OpenVPX and VME power supplies, configurable power assemblies, UPS units and associated power-conditioning modules. These products are characterized by extended operating-temperature capability, controlled component derating, high resistance to shock and vibration, enhanced electromagnetic compatibility, conduction-, air- or liquid-cooled thermal designs, conformal coating or sealed construction, and high reliability under harsh operating conditions. Depending on the platform, products are designed or tested against requirements associated with MIL-STD-461, MIL-STD-810, MIL-STD-704, MIL-STD-1275, MIL-STD-1399, DEF STAN 61-5 and RTCA/DO-160. The market covers standardized and configurable military-grade power products used across airborne, ground, naval, missile and weapon platforms as well as fixed and portable defense systems.

## Key Findings

The global average selling price reached approximately US$2,650 per unit in 2025

DC-DC converters constitute the broadest product category by unit volume

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Conduction-cooled VPX and VITA 62 products represent an important high-value growth segment

Airborne and ground defense platforms account for a substantial share of current demand

Market Trends

The Military Grade COTS Power Supply industry is moving toward higher power density, standardized open architectures and greater reuse of qualified power building blocks across multiple defense platforms. Traditional brick-format DC-DC converters remain fundamental because they provide compact and modular conversion for distributed power architectures, while demand is increasingly shifting toward complete conduction-cooled VPX and VITA 62 power supplies for radar, electronic warfare, mission computing and other high-performance embedded systems. SynQor's current Mil-COTS portfolio illustrates this transition, ranging from industry-standard DC-DC modules to configurable AC-DC and DC-DC assemblies, with operating-temperature capability extending from approximately ?55°C to +100°C and products designed around MIL-STD-461, MIL-STD-704, MIL-STD-1275 and related requirements. OpenVPX and SOSA-aligned architectures are increasing the importance of standardized 3U and 6U power supplies that can support higher computing densities while maintaining conduction cooling and harsh-environment reliability. Behlman's VPXtra family, for example, combines VITA 62 compliance with rugged conduction-cooled designs for airborne, shipboard, ground and mobile military systems. Product development is also moving toward higher input-voltage ranges, higher output power, improved conversion efficiency, integrated EMI filtering, active power-factor correction, digital monitoring, intelligent fault protection and configurable multi-output architectures. Longer term, competition will increasingly center on power density, thermal performance, compliance with open system standards, qualification reuse, shorter integration cycles and the ability to modify standard COTS platforms without the cost and lead time of completely custom development.

# Market Dynamics

## Drivers

Demand is primarily driven by the continuing increase in electronic content across

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aircraft, unmanned systems, armored vehicles, naval platforms, missiles, radar, communications and electronic-warfare equipment. Modern defense systems require substantially more onboard computing, sensing, data processing and radio-frequency electronics, increasing both total power consumption and the number of voltage rails that must be generated locally. Migration toward modular open-system architectures is reinforcing this trend because VPX-based mission computers and sensor-processing platforms require standardized high-density power supplies compatible with defined mechanical, electrical and thermal interfaces. The military preference for qualified COTS solutions also supports market growth by reducing engineering effort, program risk and replacement lead time compared with fully customized designs. SynQor explicitly positions its Mil-COTS converters as off-the-shelf products using standard formats and conservative component derating, while Behlman emphasizes the ability to reconfigure standard COTS products to meet customer requirements without full-custom development.

## Restraints

Market growth is constrained by qualification requirements, relatively low production volumes and long defense-program development cycles. Military-grade COTS products remain significantly more expensive than commercial or ordinary industrial power supplies because they require extended-temperature components, specialized thermal design, electromagnetic compatibility control, conformal coating, screening, documentation and environmental testing. Different platform power buses also create substantial engineering complexity: aircraft, vehicles and shipboard systems operate under different transient, hold-up, input-voltage and EMI requirements. Customers may additionally impose program-specific screening, configuration control or component traceability even when the underlying product is commercially available. These requirements increase production cost and make it difficult to obtain the same economies of scale achieved in telecommunications, data-center or industrial power markets.

## Opportunities

The strongest opportunities are developing around OpenVPX, SOSA-aligned embedded computing, high-power radar and electronic warfare, unmanned platforms and distributed high-voltage power architectures. Increasing processor, FPGA and RF payload power is creating demand for higher-wattage conduction-cooled supplies within constrained 3U VPX envelopes. Kontron's current VITA 62 portfolio includes 600 W

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VPX power supplies designed for MIL-STD-461, MIL-STD-704 and MIL-STD-1275 environments, illustrating the increasing standardization of rugged defense power architectures. Higher-voltage distributed power is another emerging opportunity. SynQor's military bus-converter family now includes products operating from several-hundred-volt input buses and reaching approximately 3 kW per module, enabling intermediate-bus architectures for high-power electronic loads. Suppliers able to combine standard product platforms with rapid configuration, qualification support and long-term lifecycle management are positioned to capture a growing share of future defense programs.

### Challenges

The industry faces persistent challenges associated with component obsolescence, supply-chain security, counterfeit prevention and maintaining form-fit-function compatibility throughout defense-platform lifecycles that may extend for decades. Semiconductor and passive-component generations change much faster than military procurement cycles, forcing manufacturers to manage controlled redesigns without invalidating qualification or triggering major system-level requalification. Increasing power density simultaneously creates more difficult thermal-management and EMI problems, particularly in sealed or conduction-cooled systems where airflow is unavailable. Compliance with multiple platform standards can also create conflicting electrical and mechanical requirements. Manufacturers therefore need strong configuration management, component traceability, lifecycle engineering, qualification expertise and long-term customer support in addition to conventional power-electronics design capabilities.

## Industry Chain Analysis

The upstream industry primarily consists of power semiconductors, magnetic components, transformers, capacitors, resistors, connectors, printed circuit boards, thermal interface materials, aluminum housings, conformal coatings and control ICs. High-reliability MOSFETs, wide-bandgap devices, radiation-tolerant components in selected applications, high-temperature capacitors and specialized magnetic components have an important influence on power density, efficiency and reliability. Midstream suppliers design and manufacture DC-DC converters, AC-DC power supplies, VPX/VME modules, configurable assemblies, UPS systems and associated EMI filters, with value creation concentrated in circuit topology, thermal design,

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ruggedization, qualification, component derating and configuration management. Downstream customers include defense electronics OEMs, avionics manufacturers, radar and electronic-warfare suppliers, vehicle and ship system integrators, missile manufacturers and government defense programs. Because military platforms require long service lives, aftermarket replacement, technology refresh and form-fit-function replacement also represent an important recurring part of the value chain.

Segment Insights

By product type, DC-DC converters form the largest unit-volume segment because distributed military electronic architectures require multiple conversion stages between platform power buses and processors, sensors, communications electronics and other loads. Standard quarter-brick, half-brick and full-brick modules provide a combination of compact size, established mechanical formats and scalable output power. SynQor's military portfolio demonstrates the wide range of this segment, including 28 V families, extended-input families and high-voltage bus converters spanning from below 100 W to approximately 3 kW. AC-DC and configurable power supplies have lower unit volumes but generally higher system values because they integrate filtering, power-factor correction, hold-up capability, multiple outputs and environmental packaging. VPX/VME power supplies are becoming particularly important in high-performance embedded computing. Conduction cooling is the dominant architecture for sealed airborne, vehicle and naval electronics, while forced-air cooling remains relevant to sheltered racks and fixed installations and liquid cooling is emerging for exceptionally high-density electronic payloads.

Downstream Market Opportunities

Airborne platforms represent one of the most technically demanding downstream markets because avionics, radar, mission computers and electronic-warfare systems require low weight, high power density and resistance to altitude, temperature, vibration and aircraft power-bus transients. Ground platforms provide broad demand for 28 V-class rugged converters and complete power assemblies supporting communications, sensing, active protection and mission computing. Naval platforms require products compatible with shipboard electrical interfaces and stringent EMI environments, while missile and weapon platforms create demand for compact, highly ruggedized power modules with severe shock and vibration capability. Fixed and portable defense systems encompass deployable communications, command posts, surveillance equipment and rugged computing systems, creating opportunities for configurable power supplies and UPS architectures. The growing overlap between platform

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electronics and high-performance embedded computing is making standardized military COTS power architectures increasingly important across all of these downstream segments.

## Regional Insights

North America represents the largest value-oriented market and the deepest manufacturing ecosystem for Military Grade COTS Power Supply, supported by large defense procurement programs, widespread adoption of OpenVPX and SOSA architectures and a dense base of specialized power-electronics suppliers. The United States hosts manufacturers including Vicor, SynQor, Behlman, Advanced Conversion Technology, Technology Dynamics, AJPS, Milpower Source, Astrodyne TDI, Aegis Power Systems and multiple aerospace electronics groups. Europe maintains an important specialist base in rugged DC-DC, VPX and avionics power, with manufacturers including GAIA Converter and Kontron and demand supported by aircraft, missile, naval and land-system programs. China is expanding indigenous high-reliability power-module capabilities, particularly for aerospace, aviation, vehicles, ships and VPX-type embedded systems, with Beijing Relpow Technology representing an important domestic supplier in the company pool. Japan has a strong general high-reliability power-electronics industry, but publicly identified product portfolios are less frequently marketed specifically under the MIL-COTS terminology used by U.S. suppliers. The broader Asia-Pacific market is nevertheless expected to gain importance as regional defense electronics localization and indigenous platform development continue.

## Competitive Landscape Analysis

The competitive landscape is characterized by a combination of specialist military power suppliers and larger aerospace or power-electronics groups. Vicor and SynQor compete strongly in high-density modular conversion and standardized MIL-COTS architectures, while Behlman, ACT, Milpower Source, Technology Dynamics, AJPS and Aegis Power Systems have established positions in rugged complete supplies and configurable military systems. SynQor's portfolio extends from board-mounted Mil-COTS converters to complete configurable assemblies, while Behlman combines conventional rugged COTS products with VITA 62 and SOSA-aligned VPX supplies. GAIA Converter, Kontron and other European suppliers provide additional competition in avionics, VPX and high-reliability DC-DC applications, while Beijing Relpow Technology contributes to

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the expansion of China's domestic military power-electronics supply chain. Competition is less dependent on commodity price than on qualification history, platform compatibility, power density, EMI performance, thermal design, long-term availability and the manufacturer's ability to modify a proven COTS platform while retaining qualification and configuration control.

## Report Scope

This report studies the global Military Grade COTS Power Supply production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Military Grade COTS Power Supply 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 Military Grade COTS Power Supply that contribute to its increasing demand across many markets.

## Highlights and key features of the study

Global Military Grade COTS Power Supply total production and demand, 2021-2032, (K Units)

Global Military Grade COTS Power Supply total production value, 2021-2032, (USD Million)

Global Military Grade COTS Power Supply production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Military Grade COTS Power Supply consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Military Grade COTS Power Supply domestic production, consumption, key domestic manufacturers and share

Global Military Grade COTS Power Supply production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

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Global Military Grade COTS Power Supply production by Product Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Military Grade COTS Power Supply production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Military Grade COTS Power Supply 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 Advanced Conversion Technology (ACT), Technology Dynamics, Inc., Vicor Corporation, Schaefer, Inc., Behlman Electronics, Inc., AJ's Power Source, Inc. (AJPS), Telkoor Power Supplies Ltd., Astrodyne TDI, Milpower Source, Inc., GAIA Converter, 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 Military Grade COTS Power Supply 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 Product 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 Military Grade COTS Power Supply Market, By Region:

United States

China

Europe

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Japan

South Korea

ASEAN

India

Rest of World

## Market Segmentation

### Global Military Grade COTS Power Supply Market, Segmentation by Product Type:

AC-DC Power Supply

DC-DC Converter

VPX/VME Power Supply

UPS Power Supply

Configurable Power Supply

Others

### Global Military Grade COTS Power Supply Market, Segmentation by Output Power:

Below 100 W

100–500 W

500–1,000 W

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1,000–3,000 W

Above 3,000 W

### Global Military Grade COTS Power Supply Market, Segmentation by Cooling Method:

Conduction-cooled

Air-cooled

Liquid-cooled

Others

### Global Military Grade COTS Power Supply Market, Segmentation by Application:

Airborne Platforms

Ground Platforms

Naval Platforms

Missile and Weapon Platforms

Fixed and Portable Defense Systems

Others

## Companies Profiled:

Advanced Conversion Technology (ACT)

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Technology Dynamics, Inc.

Vicor Corporation

Schaefer, Inc.

Behlman Electronics, Inc.

AJ's Power Source, Inc. (AJPS)

Telkoor Power Supplies Ltd.

Astrodyne TDI

Milpower Source, Inc.

GAIA Converter

RITRONICS

Falcon Electric, Inc.

Arnold Magnetics Corporation

Aegis Power Systems, Inc.

SynQor, Inc.

Crane Aerospace & Electronics / Interpoint

Beijing Relpow Technology Co., Ltd.

W-IE-NE-R Power Electronics

Kontron

Century Electronics / Perillo Industries

Bel Aerospace & Defense

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Abbott Technologies

Prime Power

Collins Aerospace

Amphenol Aerospace

## Key Questions Answered

1. How big is the global Military Grade COTS Power Supply market?
2. What is the demand of the global Military Grade COTS Power Supply market?
3. What is the year over year growth of the global Military Grade COTS Power Supply market?
4. What is the total value of the global Military Grade COTS Power Supply market?
5. Who are the Major Players in the global Military Grade COTS Power Supply market?
6. What are the growth factors driving the market demand?

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