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Global On-board High-to-Low Voltage DC-DC Converter Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global On-board High-to-Low Voltage DC-DC Converter market size is expected to reach $ 1701 million by 2032, rising at a market growth of 9.2% CAGR during the forecast period (2026-2032).

In 2025, global production capacity of on-board high-to-low voltage DC-DC converters reached approximately 78 million units, with actual output around 61 million units. The average selling price was about USD 165 per unit. Gross margins mainly ranged from 25% to 40%, supported by automotive-grade reliability requirements and power electronics integration. An on-board high-to-low voltage DC-DC converter is a power electronic device that converts high-voltage DC from a traction battery (typically 200?800 V) into low-voltage DC (12 V or 24 V) to supply auxiliary systems in electric and hybrid vehicles, such as lighting, infotainment, control units, and safety systems.

Upstream includes power semiconductor devices (MOSFETs, IGBTs, SiC devices), magnetic components, capacitors, controllers, PCBs, and automotive-grade connectors. The midstream focuses on DC-DC converter design, integration, packaging, software control, and automotive qualification. Downstream applications are primarily in battery electric vehicles (BEVs), plug-in hybrid vehicles (PHEVs), hybrid vehicles, and increasingly in commercial electric vehicles and special-purpose vehicles.

The on-board high-to-low voltage DC-DC converter market is expanding rapidly, driven by the global penetration of new energy vehicles. Higher vehicle electrification levels and the transition toward 800 V platforms are increasing power density and efficiency requirements for DC-DC converters. Automakers are shifting from discrete designs to highly integrated modules, sometimes combined with on-board chargers or power

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distribution units, to reduce weight and cost. The adoption of SiC devices further improves efficiency and thermal performance. Although pricing pressure exists due to scale expansion, suppliers with strong automotive-grade design, mass production capability, and system integration expertise maintain solid margins. Overall, this market is a high-growth, technology-intensive segment closely tied to the long-term development of electric mobility.

This report studies the global On-board High-to-Low Voltage DC-DC Converter production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for On-board High-to-Low Voltage DC-DC Converter 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 On-board High-to-Low Voltage DC-DC Converter that contribute to its increasing demand across many markets.

Highlights and key features of the study
Global On-board High-to-Low Voltage DC-DC Converter total production and demand, 2021-2032, (K Units)
Global On-board High-to-Low Voltage DC-DC Converter total production value, 2021-2032, (USD Million)
Global On-board High-to-Low Voltage DC-DC Converter production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)
Global On-board High-to-Low Voltage DC-DC Converter consumption by region & country, CAGR, 2021-2032 & (K Units)
U.S. VS China: On-board High-to-Low Voltage DC-DC Converter domestic production, consumption, key domestic manufacturers and share
Global On-board High-to-Low Voltage DC-DC Converter production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)
Global On-board High-to-Low Voltage DC-DC Converter production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)
Global On-board High-to-Low Voltage DC-DC Converter production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global On-board High-to-Low Voltage DC-DC Converter market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key

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developments. Key companies covered as a part of this study include Bosch, Continental, Denso, Valeo, Vitesco Technologies, Mitsubishi Electric, Hitachi Astemo, Infineon Technologies, STMicroelectronics, Texas Instruments, 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 On-board High-to-Low Voltage DC-DC Converter 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 On-board High-to-Low Voltage DC-DC Converter Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global On-board High-to-Low Voltage DC-DC Converter Market, Segmentation by Type:

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Low Power (Below 1kW)

Medium Power (1-3kW)

High Power (Above 3kW)

Global On-board High-to-Low Voltage DC-DC Converter Market, Segmentation by Cooling Method:

Air-cooled DC-DC Converter

Liquid-cooled DC-DC Converter

Global On-board High-to-Low Voltage DC-DC Converter Market, Segmentation by Application:

Commercial Vehicles

Passenger Vehicles

Companies Profiled:

Bosch

Continental

Denso

Valeo

Vitesco Technologies

Mitsubishi Electric

Hitachi Astemo

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Infineon Technologies

STMicroelectronics

Texas Instruments

Analog Devices

Vicor

onsemi

ROHM Semiconductor

Delta Electronics

Huawei Digital Power

BYD

Nidec Corporation

CATL

Key Questions Answered:

1. How big is the global On-board High-to-Low Voltage DC-DC Converter market?
2. What is the demand of the global On-board High-to-Low Voltage DC-DC Converter market?
3. What is the year over year growth of the global On-board High-to-Low Voltage DC-DC Converter market?
4. What is the production and production value of the global On-board High-to-Low Voltage DC-DC Converter market?
5. Who are the key producers in the global On-board High-to-Low Voltage DC-DC Converter market?
6. What are the growth factors driving the market demand?

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Contents

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3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

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4 UNITED STATES VS CHINA VS REST OF THE WORLD

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5 MARKET ANALYSIS BY TYPE

6 MARKET ANALYSIS BY COOLING METHOD

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9 INDUSTRY CHAIN ANALYSIS

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List Of Tables

LIST OF TABLES

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Table 184. On-board High-to-Low Voltage DC-DC Converter Typical Distributors

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List Of Figures

LIST OF FIGURES

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