

# Global On-board High-to-Low Voltage DC-DC Converter 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 On-board High-to-Low Voltage DC-DC Converter market size was valued at US\$ 918 million in 2025 and is forecast to a readjusted size of US\$ 1701 million by 2032 with a CAGR of 9.2% during review period.

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 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 is a detailed and comprehensive analysis for global On-board High-to-Low Voltage DC-DC Converter 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 On-board High-to-Low Voltage DC-DC Converter market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global On-board High-to-Low Voltage DC-DC Converter 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 On-board High-to-Low Voltage DC-DC Converter 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 On-board High-to-Low Voltage DC-DC Converter 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:**

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

To assess the growth potential for On-board High-to-Low Voltage DC-DC

## Converter

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 On-board High-to-Low Voltage DC-DC Converter 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 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.

## Market Segmentation

On-board High-to-Low Voltage DC-DC Converter 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 segment by Type

Low Power (Below 1kW)

Medium Power (1-3kW)

High Power (Above 3kW)

### Market segment by Cooling Method

Air-cooled DC-DC Converter

Liquid-cooled DC-DC Converter

## Market segment by Application

Commercial Vehicles

Passenger Vehicles

## Major players covered

Bosch

Continental

Denso

Valeo

Vitesco Technologies

Mitsubishi Electric

Hitachi Astemo

Infineon Technologies

STMicroelectronics

Texas Instruments

Analog Devices

Vicor

onsemi

ROHM Semiconductor

Delta Electronics

Huawei Digital Power

BYD

Nidec Corporation

CATL

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)

**The content of the study subjects, includes a total of 15 chapters:**

Chapter 1, to describe On-board High-to-Low Voltage DC-DC Converter product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of On-board High-to-Low Voltage DC-DC Converter, with price, sales quantity, revenue, and global market share of On-board High-to-Low Voltage DC-DC Converter from 2021 to 2026.

Chapter 3, the On-board High-to-Low Voltage DC-DC Converter competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the On-board High-to-Low Voltage DC-DC Converter 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 On-board High-to-Low Voltage DC-DC Converter 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 On-board High-to-Low Voltage DC-DC Converter.

Chapter 14 and 15, to describe On-board High-to-Low Voltage DC-DC Converter sales channel, distributors, customers, research findings and conclusion.

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