

Global Rack-Level Power Supply Systems Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Rack-Level Power Supply Systems market size is expected to reach \$ 7349 million by 2032, rising at a market growth of 18.0% CAGR during the forecast period (2026-2032).

Rack-level power supply systems are integrated power platforms installed inside or immediately adjacent to server, storage, and networking racks. They typically combine a power shelf or rack, hot-swappable AC-DC or DC-DC power modules, busbars and distribution assemblies, a power management controller, and optional battery backup or power-capacitor units. Their primary function is to convert single-phase or three-phase AC, high-voltage DC, or other upstream feeds into stable 12 V, 48–54 V, or other rack DC bus outputs while providing redundant parallel operation, fault isolation, load sharing, telemetry, and short-duration ride-through. These systems support high-density IT equipment used in cloud, artificial intelligence, high-performance computing, telecommunications, and edge facilities with efficient, scalable, and serviceable power delivery. Products are commonly differentiated by rated output power, input architecture, rack form factor, and backup configuration, with key performance criteria including conversion efficiency, power density, transient response, redundancy level, hot-swap capability, and management interfaces. The blended gross margin is approximately 32%.

Rising rack power density from AI training and inference, high-performance computing, and cloud expansion is placing pressure on conventional server-level power supplies and low-capacity rack distribution through higher copper losses, constrained rack space, and more demanding transient loads. Hyperscale cloud operators, colocation providers, and large enterprises are increasingly centralizing power conversion and distribution at rack level to reduce conversion stages, accelerate deployment, and scale

capacity modularly across successive GPU and accelerator platforms.

Product development is centered on 48–54 V DC buses, OCP ORv3 and high-power rack architectures, with a gradual transition toward higher-voltage DC input and rack-side DC-DC conversion. Power shelves in the 33–72 kW range, hot-swappable modules, N+1 or N+N redundancy, coordinated battery and power-capacitor backup, digital telemetry, and liquid-cooling compatibility are becoming major competitive priorities. Wide-bandgap power devices, high-frequency magnetics, and advanced control algorithms are improving efficiency, power density, and dynamic-load performance.

North American demand is led by cloud and AI infrastructure investment, Asia has strong manufacturing depth in power modules, magnetics, racks, and system integration, and European customers place greater emphasis on energy efficiency, standards compliance, and serviceability. The market retains significant customization and qualification barriers because products must be validated with server platforms, busbars, backup systems, and thermal management. Rapid standards evolution, semiconductor and copper cost volatility, and customer concentration remain key risks, while 800 V DC architectures, megawatt-class racks, and integrated power-and-cooling platforms create new growth opportunities.

Report Scope

This report studies the global Rack-Level Power Supply Systems production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Rack-Level Power Supply Systems 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 Rack-Level Power Supply Systems that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Rack-Level Power Supply Systems total production and demand,
2021-2032, (Units)

Global Rack-Level Power Supply Systems total production value, 2021-2032, (USD Million)

Global Rack-Level Power Supply Systems production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Rack-Level Power Supply Systems consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Rack-Level Power Supply Systems domestic production, consumption, key domestic manufacturers and share

Global Rack-Level Power Supply Systems production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Rack-Level Power Supply Systems production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Rack-Level Power Supply Systems production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Rack-Level Power Supply Systems 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 Energy, Vertiv, Delta Electronics, Lite-On Technology, Murata Manufacturing, AcBel Polytech, FSP Group, Flex, Bel Power Solutions, Chicony Power Technology, 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 Rack-Level Power Supply Systems market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (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 Rack-Level Power Supply Systems Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Rack-Level Power Supply Systems Market, Segmentation by Type:

20 kW and Below

Above 20 kW to 40 kW

Above 40 kW to 80 kW

Above 80 kW

Global Rack-Level Power Supply Systems Market, Segmentation by Input Power Architecture:

Single-Phase AC Input

Three-Phase AC Input

High-Voltage DC Input

Multi-Input Systems

Global Rack-Level Power Supply Systems Market, Segmentation by Rack Form Factor:

19-Inch Rack Systems

21-Inch Open Rack Systems

19/21-Inch Compatible Systems

Other Rack Formats

Global Rack-Level Power Supply Systems Market, Segmentation by Backup Configuration:

Without Integrated Backup

Battery Backup Integrated

Capacitor Backup Integrated

Hybrid Backup Integrated

Global Rack-Level Power Supply Systems Market, Segmentation by Application:

Cloud Computing

Colocation Services

Enterprise IT

Telecommunications

Government and Research Computing

Others

Companies Profiled:

Advanced Energy

Vertiv

Delta Electronics

Lite-On Technology

Murata Manufacturing

AcBel Polytech

FSP Group

Flex

Bel Power Solutions

Chicony Power Technology

Megmeet Electrical

Phihong Technology

ZTE

VAPEL

Key Questions Answered

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

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