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Global SiC Power Modules for AI Data Center Power 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 SiC Power Modules for AI Data Center Power market size was valued at US$ 190 million in 2025 and is forecast to a readjusted size of US$ 1401 million by 2032 with a CAGR of 29.8% during review period.

SiC Power Modules for AI Data Center Power are modular silicon carbide power semiconductor devices designed for high-power-density electrical distribution and power conversion in artificial intelligence data centers. They integrate SiC MOSFETs, SiC Schottky diodes, or hybrid Si/SiC devices on insulated substrates within power-module packages to support high-voltage, high-current, high-frequency, and low-loss switching. The market mainly covers voltage classes from approximately 650 V to 3.3 kV and configurations such as half-bridge, full-bridge, three-level, three-phase bridge, and buck/boost topologies. Key deployment points include front-end rectification, UPS and backup power, high-voltage DC buses, DC-DC conversion, energy-storage interfaces, and solid-state transformers serving AI data centers. The research scope focuses on SiC devices purchased and integrated as discrete power modules into data-center power equipment, with key evaluation parameters including rated voltage and current, conduction and switching losses, parasitic inductance, thermal resistance, insulation capability, power-cycling reliability, and package thermal performance. The estimated blended gross margin is approximately 38%.

Market Trends

AI rack power is moving from the hundred-kilowatt range toward megawatt-class

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designs, increasing copper losses, busbar size, and thermal stress in traditional low-voltage high-current distribution. This is pushing data-center power architectures toward higher DC bus voltages and fewer conversion stages. The role of SiC power modules is therefore expanding from incremental switching-loss reduction to enabling centralized 800 VDC systems, high-power UPS platforms, bidirectional energy-storage interfaces, and solid-state transformer architectures. Product development is concentrating on 1200 V and higher voltage classes, low-parasitic-inductance packages, sintered interconnects, high-thermal-conductivity insulated substrates, higher junction-temperature capability, and compatibility with liquid or enhanced cooling. Higher switching frequency also supports smaller magnetics and higher system power density.

Drivers

Rapid deployment of generative-AI training and inference clusters is making rack power density, conversion efficiency, and availability critical data-center constraints. High-efficiency SiC modules can reduce losses in AC-DC and high-voltage DC-DC stages while lowering cooling demand and passive-component size. In parallel, the move toward 800 VDC architectures, DC-coupled storage, and modular high-power UPS platforms is creating incremental demand for medium- and high-voltage SiC power modules.

Restraints

SiC substrates, epitaxy, and high-reliability packaging still carry a meaningful cost premium, while some server front-end stages must compete on total system cost with mature silicon MOSFET, IGBT, and GaN solutions. Module value also depends heavily on thermal design, gate-drive matching, and converter topology. Without simultaneous optimization of magnetics, cooling, and control, device-level efficiency gains may not fully translate into system-level economics.

Opportunities

The strongest opportunities are emerging in 800 VDC power sidecars, megawatt-class rack power systems, high-power bidirectional UPS and battery-backup platforms, centralized rectification, energy-storage interfaces, and medium-voltage solid-state transformers. As AI compute campuses expand from individual halls to multi-building

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high-density sites, SiC modules can move from component substitution toward architecture-level design-in, broadening the design window for 1200 V, 1700 V, and higher-voltage platforms.

Challenges

AI data-center power architectures are still evolving rapidly, while standards for 800 VDC distribution, protection, connectors, and safety continue to mature. Customer requirements for redundancy, short-circuit protection, insulation, and thermal management vary substantially, leading to long qualification cycles and significant engineering customization. Continued SiC capacity expansion can also pressure device pricing, requiring suppliers to defend profitability through chip performance, packaging reliability, and stronger system-level support.

Industry Chain Analysis

Upstream inputs include SiC substrates and epitaxy, MOSFET and Schottky die, AMB/DBC insulated substrates, copper terminals, sintering materials, and encapsulation materials. Wafer yield, die area, and high-thermal-conductivity substrates remain major cost and performance factors. Module manufacturers create value through die paralleling, interconnect design, low-inductance current paths, insulation, thermal-path optimization, and reliability qualification such as power cycling and high-temperature/high-humidity testing. Downstream, modules are integrated into server power supplies, UPS systems, battery-backup and energy-storage equipment, high-voltage DC distribution, DC-DC converters, and solid-state transformers before deployment in AI data centers. As SiC die prices decline, more value is expected to migrate toward low-inductance packaging, double-sided or enhanced cooling, integrated sensing, and system co-design.

Segment Insights

By voltage class, 1200 V modules are expected to become the core segment for high-voltage DC and high-power conversion in AI data centers. The 650–750 V range remains relevant to selected conventional AC front ends and lower-bus-voltage platforms, while 1700 V and higher devices are better positioned for facility-level conversion and emerging solid-state transformer stages. By device integration, full-SiC MOSFET modules are gaining fastest in efficiency- and power-density-driven projects,

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while hybrid SiC solutions retain a cost advantage in selected UPS and industrialized power platforms. Current ratings are also moving upward, with growing demand above 300 A as centralized converters seek fewer parallel modules and higher power per building block.

Downstream Market Opportunities

Hyperscale AI data centers remain the primary early adopters because they upgrade power architectures quickly, operate the highest rack densities, and place a high economic value on conversion losses. Colocation operators are following as they host larger GPU clusters and upgrade electrical infrastructure for high-density tenants. Enterprise and edge data centers are likely to adopt more gradually, but private AI clusters, low-latency inference, and regional compute nodes should create additional demand.

Regional Insights

North America remains the largest near-term market, supported by hyperscale cloud investment, GPU cluster deployment, and new AI campuses, and it is likely to lead early adoption of 800 VDC and megawatt-class rack architectures. Asia-Pacific combines expanding data-center capacity with a strong server, power-supply, and power-semiconductor manufacturing base, supporting localized sourcing across China, Japan, Korea, and Southeast Asia. Europe is smaller in absolute deployment but has strong incentives around energy efficiency, grid constraints, and high-efficiency power electronics, supporting adoption of SiC modules and DC-oriented architectures.

Competitive Landscape Analysis

Competition combines integrated power-semiconductor suppliers with SiC wafer and device capabilities and specialized module manufacturers focused on packaging and topology flexibility. Leading suppliers are investing in 200 mm SiC manufacturing, 1200 V to 1700 V platforms, low-inductance packaging, and data-center reference designs, while module specialists compete through multi-source chip strategies, standardized footprints, and configurable circuit topologies. As AI data-center customers move from component selection toward system-level architecture co-design, qualification history, long-term reliability, capacity assurance, and joint optimization with gate drivers,

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controllers, and thermal systems are becoming more important than isolated chip specifications.

Report Scope

This report is a detailed and comprehensive analysis for global SiC Power Modules for AI Data Center Power 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 SiC Power Modules for AI Data Center Power market size and forecasts, in consumption value ($ Million), sales quantity (K Units), and average selling prices (US$/Unit), 2021-2032

Global SiC Power Modules for AI Data Center Power 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 SiC Power Modules for AI Data Center Power 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 SiC Power Modules for AI Data Center Power 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 SiC Power Modules for AI Data Center Power

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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 SiC Power Modules for AI Data Center Power 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 Infineon Technologies, Wolfspeed, ROHM Semiconductor, Onsemi, STMicroelectronics, Mitsubishi Electric, Fuji Electric, Semikron Danfoss, Microchip Technology, Vincotech, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

SiC Power Modules for AI Data Center Power 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

650–750 V

900–1200 V

1700 V

2000 V and Above

Other

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Market segment by Circuit Topology

Half-Bridge / Phase-Leg

Full-Bridge

Three-Level

Three-Phase Bridge

Buck/Boost

Other

Market segment by Device Integration

Full-SiC MOSFET Modules

Hybrid SiC Modules

SiC Diode Modules

Other

Market segment by Rated Current

100 A and Below

101–300 A

301–600 A

Above 600 A

Market segment by Application

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Cloud and Colocation

Enterprise

Telecom

Government and Research

Others

Major players covered

Infineon Technologies

Wolfspeed

ROHM Semiconductor

Onsemi

STMicroelectronics

Mitsubishi Electric

Fuji Electric

Semikron Danfoss

Microchip Technology

Vincotech

StarPower Semiconductor

MACMIC

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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 SiC Power Modules for AI Data Center Power product scope, market overview, market estimation caveats and base year.
Chapter 2, to profile the top manufacturers of SiC Power Modules for AI Data Center Power, with price, sales quantity, revenue, and global market share of SiC Power Modules for AI Data Center Power from 2021 to 2026.
Chapter 3, the SiC Power Modules for AI Data Center Power competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.
Chapter 4, the SiC Power Modules for AI Data Center Power 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 SiC Power Modules for AI Data Center Power 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 SiC Power Modules for AI Data Center Power.
Chapter 14 and 15, to describe SiC Power Modules for AI Data Center Power sales

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channel, distributors, customers, research findings and conclusion.

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