

Global Solid-State Transformer (SST) for AI Data Center Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Solid-State Transformer (SST) for AI Data Center market size is expected to reach \$ 4662 million by 2032, rising at a market growth of 14.9% CAGR during the forecast period (2026-2032).

Solid-State Transformer (SST) for AI Data Center is a next-generation power conversion system specifically engineered for artificial intelligence computing infrastructures, enabling high-frequency, digitally controlled voltage transformation and intelligent power distribution to support ultra-large-scale AI workloads with high efficiency, stability, and rapid dynamic response. Compared with conventional transformers, it adopts a power electronics-based architecture to enhance real-time load balancing, grid adaptability, and system scalability, while significantly improving energy efficiency and operational reliability in high-density AI computing environments. Its key advantages include high power density, fast and precise voltage regulation, bidirectional energy flow capability, and strong compatibility with renewable energy integration and direct current power architectures. In 2025, production was approximately 2,003 units and the average price was USD 850,000 per unit. The industry's capacity utilization rate in 2025 was about 70% and the average gross margin was around 30%. Upstream, the key inputs include silicon carbide power semiconductor devices and high-frequency nanocrystalline magnetic materials, with representative suppliers such as Wolfspeed, Infineon Technologies, ROHM Semiconductor, Hitachi Metals, and VAC providing critical enabling technologies and materials. The midstream segment focuses on system architecture design, high-frequency power conversion topology development, thermal and electromagnetic management, control algorithm design, system integration, and reliability validation, which determine conversion efficiency, stability, and grid adaptability. The downstream mainly targets AI-driven computing infrastructures,

including containerized and building-based computing centers, with representative clients including NVIDIA, Google, Microsoft, Amazon Web Services, Meta, Alibaba Cloud, and Tencent Cloud.

This report studies the global Solid-State Transformer (SST) for AI Data Center production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Solid-State Transformer (SST) for AI Data Center 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 Solid-State Transformer (SST) for AI Data Center that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Solid-State Transformer (SST) for AI Data Center total production and demand, 2021-2032, (Units)

Global Solid-State Transformer (SST) for AI Data Center total production value, 2021-2032, (USD Million)

Global Solid-State Transformer (SST) for AI Data Center production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Solid-State Transformer (SST) for AI Data Center consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Solid-State Transformer (SST) for AI Data Center domestic production, consumption, key domestic manufacturers and share

Global Solid-State Transformer (SST) for AI Data Center production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Solid-State Transformer (SST) for AI Data Center production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Solid-State Transformer (SST) for AI Data Center production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Solid-State Transformer (SST) for AI Data Center 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 ABB (Switzerland), Siemens (Germany), GE (United States), Eaton (Ireland), Vertiv (United States), WindSun Science & Technology (China), Beijing Sifang Automation (China),

Eaglerise Electric & Electronic (China), Delta Electronics (Taiwan), China XD Electric (China), 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 Solid-State Transformer (SST) for AI Data Center 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 Solid-State Transformer (SST) for AI Data Center Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Solid-State Transformer (SST) for AI Data Center Market, Segmentation by Type:

10-35kV

35-110kV

?110kV

Global Solid-State Transformer (SST) for AI Data Center Market, Segmentation by Topology Architecture:

Three-Stage Topology

Two-Stage Topology

Global Solid-State Transformer (SST) for AI Data Center Market, Segmentation by Port Configuration:

DC Solid-State Transformer

AC Solid-State Transformer

Others

Global Solid-State Transformer (SST) for AI Data Center Market, Segmentation by Application:

Containerized Data Center

Building Data Center

Others

Companies Profiled:

ABB (Switzerland)

Siemens (Germany)

GE (United States)

Eaton (Ireland)

Vertiv (United States)

WindSun Science & Technology (China)

Beijing Sifang Automation (China)

Eaglerise Electric & Electronic (China)

Delta Electronics (Taiwan)

China XD Electric (China)

Hainan Jinpan Smart Technology (China)

Hitachi (Japan)

Key Questions Answered:

1. How big is the global Solid-State Transformer (SST) for AI Data Center market?
2. What is the demand of the global Solid-State Transformer (SST) for AI Data Center market?
3. What is the year over year growth of the global Solid-State Transformer (SST) for AI Data Center market?
4. What is the production and production value of the global Solid-State Transformer (SST) for AI Data Center market?
5. Who are the key producers in the global Solid-State Transformer (SST) for AI Data Center market?
6. What are the growth factors driving the market demand?

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