

Global Vertica Power Delivery Modules Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Vertica Power Delivery Modules market size is expected to reach \$ 3956 million by 2032, rising at a market growth of 27.1% CAGR during the forecast period (2026-2032).

Vertical Power Delivery Modules (VPD modules) are high-power-density point-of-load DC-DC modules designed for high-current processors. They are typically mounted on the backside of the PCB directly beneath a CPU, GPU, AI accelerator, or ASIC, or integrated close to the package, so current reaches the load through a short Z-axis path that reduces power-delivery-network impedance and I^2R loss. Typical products integrate power stages, magnetics, capacitors, and selected control, sensing, and protection functions in a low-profile package, using architectures such as multiphase synchronous buck conversion, current multiplication, or integrated voltage regulation. Output voltage is commonly below or around 1 V, while individual modules range from roughly one hundred amperes to several hundred amperes and can be paralleled for processor rails requiring more than one thousand amperes. Key downstream products include AI accelerator cards, server motherboards, data center switching equipment, and HPC compute boards. Major purchasing parameters include output current, current density, module height, transient response, conversion efficiency, and thermal resistance. The blended gross margin is approximately 48%.

Rising processor power and core current are increasing copper loss, voltage drop, and transient-response pressure in conventional lateral power delivery around the processor. Vertical power delivery moves the high-current conversion stage directly beneath the load, shortening the final PDN path while freeing topside board area for HBM, high-speed I/O, and interconnects. Adoption is therefore expanding from a limited number of customized high-end platforms toward a broader range of AI accelerators,

server processors, and high-speed networking silicon.

Product development is centered on higher current per module, lower profile, and greater integration. Dual-phase modules in the hundred-ampere class are being extended toward quad-phase and higher-current-density designs, with increasing use of integrated magnetics, embedded capacitors, digital control, TLVR, and tileable module arrays. Cold-plate compatibility, double-sided thermal paths, and fast transient performance are also becoming key design parameters. Supply is broadening from specialist power-module vendors to power-semiconductor companies and large power-system manufacturers, although processor pin mapping, board layout, and thermal structure still require substantial co-design and limit standardization.

Demand is concentrated in North American cloud and AI platform ecosystems, while Asia remains a major manufacturing base for servers, accelerator cards, and power modules, and European suppliers hold important positions in power semiconductors and advanced packaging. Customer qualification cycles, processor-platform design wins, and capacity for high-density magnetics and packaging can affect the pace of volume deployment. Lateral power delivery remains cost-competitive for lower-current platforms, but the economics of vertical delivery improve as processor current rises. Future opportunities are strongest in next-generation GPUs, custom AI ASICs, data center switch silicon, and co-packaged optics platforms, while key risks include rapid power-architecture changes, package-integrated regulation, thermal constraints, customer concentration, and intellectual-property barriers.

Report Scope

This report studies the global Vertica Power Delivery Modules production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Vertica Power Delivery Modules 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 Vertica Power Delivery Modules that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Vertica Power Delivery Modules total production and demand, 2021-2032, (K Units)

Global Vertica Power Delivery Modules total production value, 2021-2032, (USD Million)

Global Vertica Power Delivery Modules production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Vertica Power Delivery Modules consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Vertica Power Delivery Modules domestic production, consumption, key domestic manufacturers and share

Global Vertica Power Delivery Modules production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Vertica Power Delivery Modules production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Vertica Power Delivery Modules production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Vertica Power Delivery Modules 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 Vicor, Infineon Technologies, Monolithic Power Systems, Empower Semiconductor, Flex Power Modules, Delta Electronics, Renesas Electronics, 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 Vertica Power Delivery Modules 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 Vertica Power Delivery Modules Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Vertica Power Delivery Modules Market, Segmentation by Type:

Up to 100 A

101–200 A

201–300 A

Over 300 A

Global Vertica Power Delivery Modules Market, Segmentation by Phase Count:

Single-Phase

Dual-Phase

Quad-Phase

More than Four Phases

Other Phase Configurations

Global Vertica Power Delivery Modules Market, Segmentation by Conversion Architecture:

Multiphase Buck Modules

Current Multiplier Modules

Integrated Voltage Regulator Modules

Other Architectures

Global Vertica Power Delivery Modules Market, Segmentation by Module Height:

Up to 4 mm

Over 4 to 6 mm

Over 6 mm

Global Vertica Power Delivery Modules Market, Segmentation by Application:

AI Accelerator Cards

Server Motherboards

Data Center Switches

HPC Compute Boards

Others

Companies Profiled:

Vicor

Infineon Technologies

Monolithic Power Systems

Empower Semiconductor

Flex Power Modules

Delta Electronics

Renesas Electronics

Key Questions Answered

1. How big is the global Vertica Power Delivery Modules market?

2. What is the demand of the global Vertica Power Delivery Modules market?
3. What is the year over year growth of the global Vertica Power Delivery Modules market?
4. What is the total value of the global Vertica Power Delivery Modules market?
5. Who are the Major Players in the global Vertica Power Delivery Modules market?
6. What are the growth factors driving the market demand?

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