

Global VSC-HVDC DC-Link Capacitors Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global VSC-HVDC DC-Link Capacitors market size is expected to reach \$ 1648 million by 2032, rising at a market growth of 12.3% CAGR during the forecast period (2026-2032).

Flexible DC support capacitors are high-capacity DC film capacitors installed in the submodules of VSC-HVDC and MMC-HVDC flexible DC converter valves. They typically form part of a power submodule together with IGBTs, IGCTs, or other fully controlled power semiconductors, bypass switches, stacked busbars, and valve control units.

Their primary functions include:

Stabilizing the DC-side voltage of the submodule;

Storing and releasing transient energy;

Absorbing power fluctuations and ripple currents in the bridge arms;

Reducing DC voltage fluctuations;

Supporting converter fault ride-through and dynamic power regulation;

Suppressing spikes and high-frequency oscillations caused by device switching.

The scope of application of NB/T 11388-2023 explicitly covers DC capacitors installed within the power module subunits of converter valves in flexible high-voltage DC

transmission systems rated at ± 800 kV and below. Typical parameters for Chinese FHVDC products include a rated voltage of 1.0–4.0 kV, a rated capacitance of 2,000–20,000 μ F, an equivalent series inductance (ESL) not exceeding 50 nH, and a design life of up to 40 years.

In 2025, global sales of VSC-HVDC DC-Link Capacitors reached 65.77 thousand units, with an average price of 10.83 thousand U.S. dollars per unit.

Industry Development Trends

Ultra-High-Voltage Flexible DC Drives Up Demand for Individual Projects

Flexible DC systems are gradually evolving from ± 320 kV and ± 500 kV to ± 525 kV and ± 800 kV. The transmission capacity of individual projects has increased from 1–2 GW to 4–8 GW. Although higher-voltage power devices can reduce the number of submodules, the voltage, capacitance, and reliability requirements for individual capacitors have significantly increased.

Offshore Wind Power Becomes Europe's Largest Growth Market

Offshore wind projects are located far from land, and AC transmission faces challenges related to reactive power compensation and cable charging currents; VSC-HVDC is typically the preferred solution for large-scale offshore wind projects. Offshore FDC projects currently under construction or in the planning stages in Europe will continue to drive demand for highly reliable, moisture- and heat-resistant, low-maintenance capacitors. Several of Siemens Energy's offshore and cross-border interconnection projects have already adopted HVDC PLUS technology with an MMC structure.

Capacitors Are Evolving Toward Higher Voltage, Larger Capacitance, and Lower Inductance

Mainstream products are shifting from 2.0–2.8 kV to 3.0–4.0 kV, with capacitance expanding from 4,000–6,000 μ F to 8,000–12,000 μ F, while simultaneously requiring ESL values below 30–50 nH and further reductions in ESR. Manufacturers such as TDK have already launched low-inductance DC-link products designed for high-frequency SiC power electronic systems, with rated voltages reaching 2 kV, reflecting the trend toward higher frequencies and lower inductance.

6.5 kV IGBTs, IGCTs, and SiC Transform Product Architecture

IGBTs or IGCTs operating at higher voltage levels can reduce the number of converter valve submodules and lower control complexity, but they increase the voltage and energy density of individual submodules. The market may experience a structural shift in the future characterized by “sales growth lagging behind the growth in HVDC capacity, while the value per unit increases.” China Southern Power Grid has announced a technological breakthrough in 6.5 kV/3 kA IGBT HVDC converter valve technology.

Dry-type metallized polypropylene film becomes the mainstream choice

HVDC support capacitors require self-healing, non-polarity, low loss, and high ripple current resistance; dry-type metallized polypropylene film has already captured approximately 85% of the market. Liquid-impregnated products are still used in some high-voltage, high-energy-density, or special-environment projects.

Online Condition Monitoring Is Gradually Becoming Standard Equipment

Due to the large number of capacitors in MMCs, capacity degradation or rising ESR in a single capacitor can affect the voltage balance of the submodule. Future products will increasingly integrate monitoring of temperature, pressure, and electrical parameters, and will assess capacity and remaining life through the converter valve control system. Relevant standards from the Chinese Society for Electrical Engineering have already included the condition evaluation of submodule DC support capacitors as a core component.

Domestic Substitution in China Enters the Stage of Engineering-Scale Mass Production

In China's early HVDC projects, high-end support capacitors were primarily supplied by European and Japanese companies. In recent years, companies such as XD Electric Capacitor, Guilin Capacitor, Faratron, Saijing, and Chenrui have successively completed product certification and engineering validation, marking the transition of domestic production from the prototype stage to mass production.

Report Scope

This report studies the global VSC-HVDC DC-Link Capacitors production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for VSC-HVDC DC-Link Capacitors 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 VSC-HVDC DC-Link Capacitors that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global VSC-HVDC DC-Link Capacitors total production and demand, 2021-2032, (K Units)

Global VSC-HVDC DC-Link Capacitors total production value, 2021-2032, (USD Million)

Global VSC-HVDC DC-Link Capacitors production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global VSC-HVDC DC-Link Capacitors consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: VSC-HVDC DC-Link Capacitors domestic production, consumption, key domestic manufacturers and share

Global VSC-HVDC DC-Link Capacitors production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global VSC-HVDC DC-Link Capacitors production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global VSC-HVDC DC-Link Capacitors production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global VSC-HVDC DC-Link Capacitors 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 Hitachi Energy Ltd., ELECTRONICON Kondensatoren GmbH, GE Vernova Inc., TDK Corporation, Vishay

Intertechnology, Inc., YAGEO Corporation (KEMET), WIMA GmbH & Co. KG, Mersen S.A., Cornell Dubilier Electronics, Inc., Ducati Energia S.p.A., 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 VSC-HVDC DC-Link Capacitors market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (K 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 VSC-HVDC DC-Link Capacitors Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global VSC-HVDC DC-Link Capacitors Market, Segmentation by Type:

Dry-Type Metallized Polypropylene Film Capacitors

Oil-Impregnated Polypropylene Film Capacitors

Global VSC-HVDC DC-Link Capacitors Market, Segmentation by Rated Voltage:

Below 2 kV

2–3 kV

3–4 kV

Above 4 kV

Global VSC-HVDC DC-Link Capacitors Market, Segmentation by Rated Capacitance:

Below 4,000 μ F

4,000–8,000 μ F

8,000–12,000 μ F

Above 12,000 μ F

Global VSC-HVDC DC-Link Capacitors Market, Segmentation by Application:

Point-to-Point VSC-HVDC Transmission

Offshore Wind HVDC Export

Multi-Terminal HVDC Grids

Back-to-Back HVDC Interconnection

Urban Power Grid DC Infeed

Medium-Voltage DC Distribution

Flexible Low-Frequency Transmission

Renewable Energy Base HVDC Transmission

Companies Profiled:

Hitachi Energy Ltd.

ELECTRONICON Kondensatoren GmbH

GE Vernova Inc.

TDK Corporation

Vishay Intertechnology, Inc.

YAGEO Corporation (KEMET)

WIMA GmbH & Co. KG

Mersen S.A.

Cornell Dubilier Electronics, Inc.

Ducati Energia S.p.A.

Iskra d.o.o.

Nichicon Corporation

Shizuki Electric Company Inc.

Xiamen Faratronic Co., Ltd.

Sun.King Technology Group Limited

Wuxi CRE New Energy Technology Co., Ltd.

Anhui Tongfeng Electronics Co., Ltd.

Nantong Jianghai Capacitor Co., Ltd.

Guilin Power Capacitor Co., Ltd.

Xi'an XD Power Capacitor Co., Ltd.

Key Questions Answered:

1. How big is the global VSC-HVDC DC-Link Capacitors market?
2. What is the demand of the global VSC-HVDC DC-Link Capacitors market?
3. What is the year over year growth of the global VSC-HVDC DC-Link Capacitors market?
4. What is the production and production value of the global VSC-HVDC DC-Link Capacitors market?
5. Who are the key producers in the global VSC-HVDC DC-Link Capacitors market?
6. What are the growth factors driving the market demand?

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