

Global VSC-HVDC DC-Link Capacitors 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 VSC-HVDC DC-Link Capacitors market size was valued at US\$ 733 million in 2025 and is forecast to a readjusted size of US\$ 1648 million by 2032 with a CAGR of 12.3% during review period.

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 μF , 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 μF to 8,000–12,000 μF , 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 is a detailed and comprehensive analysis for global VSC-HVDC DC-Link

Capacitors 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 VSC-HVDC DC-Link Capacitors market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (K US\$/Unit), 2021-2032

Global VSC-HVDC DC-Link Capacitors market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (K US\$/Unit), 2021-2032

Global VSC-HVDC DC-Link Capacitors market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (K US\$/Unit), 2021-2032

Global VSC-HVDC DC-Link Capacitors market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (K 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 VSC-HVDC DC-Link Capacitors

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 VSC-HVDC DC-Link Capacitors 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 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.

Market Segmentation

VSC-HVDC DC-Link Capacitors 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 segment by Type

Dry-Type Metallized Polypropylene Film Capacitors

Oil-Impregnated Polypropylene Film Capacitors

Market segment by Rated Voltage

Below 2 kV

2–3 kV

3–4 kV

Above 4 kV

Market segment by Rated Capacitance

Below 4,000 μ F

4,000–8,000 ?F

8,000–12,000 ?F

Above 12,000 ?F

Market segment 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

Major players covered

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.

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 VSC-HVDC DC-Link Capacitors product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of VSC-HVDC DC-Link Capacitors, with price, sales quantity, revenue, and global market share of VSC-HVDC DC-Link Capacitors from 2021 to 2026.

Chapter 3, the VSC-HVDC DC-Link Capacitors competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the VSC-HVDC DC-Link Capacitors 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 VSC-HVDC DC-Link Capacitors 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 VSC-HVDC DC-Link Capacitors.

Chapter 14 and 15, to describe VSC-HVDC DC-Link Capacitors sales channel, distributors, customers, research findings and conclusion.

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