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Global AI Data Center Power Shelf Market Growth 2026-2032

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Abstracts

The global AI Data Center Power Shelf market size is predicted to grow from US$ 889 million in 2025 to US$ 2690 million in 2032; it is expected to grow at a CAGR of 17.3% from 2026 to 2032.

AI data center power shelf refers to a modular power conversion and distribution device specifically designed for artificial intelligence data centers, high-density computing nodes, and GPU server clusters. It converts input AC or DC power into stable electrical power required by servers, GPU accelerators, AI computing nodes, and other loads. An AI Data Center Power Shelf typically consists of power modules, power backplanes, control units, monitoring modules, thermal management components, and rack structures, enabling high power density supply, modular expansion, hot-swappable maintenance, power monitoring, and intelligent energy management functions.

Key Findings

In 2025, the global sales volume of AI data center power shelves will reach 202,000 units, with a production capacity of approximately 300,000 units, an average selling price of US$4,500 per unit, and an average gross profit margin of 25%-35%.

High-power 48V DC Power Shelf solutions are becoming the major development direction

AI training centers and GPU server clusters represent the largest application segments

Market Trends

The AI Data Center Power Shelf market is transitioning from conventional server power

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supply solutions toward high-density, modular, and intelligent power architectures. Increasing GPU power consumption and AI rack density are accelerating the adoption of rack-level power shelves, especially solutions based on 48V DC distribution and high-efficiency power conversion. Product development is increasingly focused on higher output power, improved conversion efficiency, enhanced thermal management, and integrated digital monitoring capabilities. As AI computing infrastructure evolves, power shelves are expected to become an important interface between data center electrical systems and high-performance computing equipment.

Market Dynamics

Drivers

The rapid expansion of AI infrastructure, large-scale GPU deployment, and high-performance computing facilities is driving demand for AI Data Center Power Shelf solutions. Increasing rack power density requires more efficient and scalable power conversion systems compared with traditional distributed server power architectures. The growth of AI model training, cloud AI services, and enterprise AI deployment is accelerating investment in advanced power supply architectures.

Restraints

Market development is constrained by high technical requirements, manufacturing complexity, and component costs. High-power AI power shelves require advanced power semiconductor devices, thermal management technologies, and strict reliability standards. In addition, different AI server platforms and data center architectures require customized solutions, increasing engineering complexity and limiting product standardization.

Opportunities

The expansion of AI data centers, next-generation GPU platforms, and 48V power architectures creates significant opportunities for AI Data Center Power Shelf suppliers. The increasing adoption of rack-level DC power distribution, liquid-cooled AI systems, and intelligent energy management platforms provides additional growth opportunities for integrated power shelf solutions with monitoring and optimization capabilities.

Challenges

The industry faces challenges from rapidly changing AI hardware architectures,

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increasing power requirements, and supply chain requirements for high-performance components. Suppliers need to continuously improve power density, efficiency, reliability, and compatibility with new-generation AI servers. Market competition may also intensify as power semiconductor companies, server manufacturers, and data center infrastructure providers enter the field.

Industry Chain Analysis

The AI Data Center Power Shelf industry chain includes upstream power components and materials, midstream power shelf manufacturing and system integration, and downstream AI computing infrastructure applications. Upstream suppliers provide power semiconductors, magnetic components, capacitors, thermal management materials, control chips, and structural components. The midstream segment focuses on power module design, shelf integration, electrical testing, firmware control, and customized engineering. Downstream applications include AI training centers, cloud data centers, hyperscale computing facilities, and enterprise AI infrastructure.

Value creation is mainly concentrated in high-efficiency power conversion technology, thermal management capability, modular architecture design, and intelligent monitoring integration. Although electronic components represent a significant cost portion, system reliability, customization capability, and energy efficiency determine the overall product value.

Segment Insights

AI Data Center Power Shelf can be segmented by power architecture, output voltage, power capacity, application location, and intelligence level. By power architecture, AC-DC Power Shelf remains the mainstream configuration, while 48V DC Power Shelf is becoming a key growth segment for AI computing environments due to its advantages in reducing transmission losses and supporting higher power density. By power capacity, medium and high-power products above 20kW are becoming increasingly important as AI servers require greater energy input.

By application location, rack-level Power Shelf is the most important segment because it directly supports high-density GPU servers and AI computing nodes. Intelligent Power Shelf solutions integrating monitoring, remote management, and energy optimization functions are expected to gain wider adoption as data centers seek higher operational efficiency.

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Downstream Market Opportunities

The major downstream opportunities for AI Data Center Power Shelf are concentrated in AI training centers, cloud computing platforms, hyperscale data centers, high-performance computing facilities, and enterprise AI infrastructure. AI companies and cloud service providers require reliable, scalable, and efficient power solutions to support GPU clusters and AI workloads. Emerging applications in industrial AI, autonomous systems, medical AI, and scientific computing will further expand demand for advanced power shelf solutions.

Regional Insights

North America and Asia Pacific are the leading regional markets for AI Data Center Power Shelf. North America benefits from large-scale AI infrastructure investment, hyperscale cloud expansion, and strong demand for AI computing capacity. Asia Pacific is supported by rapid data center construction, semiconductor supply chains, and increasing AI deployment in major digital economies.

Europe focuses more on energy efficiency, sustainable data center development, and intelligent power management. Regional differences are mainly reflected in AI infrastructure investment intensity, data center construction scale, and requirements for power efficiency and reliability.

Competitive Landscape Analysis

The AI Data Center Power Shelf market includes specialized power solution providers, server manufacturers, data center infrastructure companies, and power electronics suppliers. Competition is mainly based on power density, conversion efficiency, reliability, modular design capability, intelligent management functions, and integration experience with AI server platforms.

Companies with advantages in high-efficiency power conversion, 48V architecture development, and data center power system integration are better positioned to participate in AI infrastructure projects. As AI computing requirements become more demanding, competitive differentiation is gradually shifting from standalone power modules toward integrated power shelf solutions combining hardware, monitoring, and energy management capabilities.

Report Scope

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LP Information, Inc. (LPI) ' newest research report, the “AI Data Center Power Shelf Industry Forecast” looks at past sales and reviews total world AI Data Center Power Shelf sales in 2025, providing a comprehensive analysis by region and market sector of projected AI Data Center Power Shelf sales for 2026 through 2032. With AI Data Center Power Shelf sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world AI Data Center Power Shelf industry.

This Insight Report provides a comprehensive analysis of the global AI Data Center Power Shelf landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on AI Data Center Power Shelf portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global AI Data Center Power Shelf market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AI Data Center Power Shelf and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global AI Data Center Power Shelf.

This report presents a comprehensive overview, market shares, and growth opportunities of AI Data Center Power Shelf market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

AC-DC Power Shelves

DC-DC Power Shelves

Hybrid Power Shelves

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Segmentation by Output Power:

?10 kW

10–30 kW

?30 kW

Segmentation by Redundant Configuration:

N+1 Redundant Power Shelves

N+N Redundant Power Shelves

2N Redundant Power Shelves

Segmentation by Application:

AI Training Data Center

Cloud Computing Data Center

High-Performance Computing (HPC) Center

Edge AI Data Center

Others

This report also splits the market by region:

Americas

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Canada

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- Mexico
- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel

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Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Advanced Energy

Flex

Schneider Electric

Murata Manufacturing

Delta Electronics

Lite-On Technology

Bel Power Solutions

Vertiv

Legrand

AcBel Polytech

Canonical

FSP

Phihong

Chicony Power Technology

Megmeet

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Zhongheng Electric

Honor

Aohai Technology

Key Questions Addressed in this Report

What is the 10-year outlook for the global AI Data Center Power Shelf market?

What factors are driving AI Data Center Power Shelf market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do AI Data Center Power Shelf market opportunities vary by end market size?

How does AI Data Center Power Shelf break out by Type, by Application?

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