

Global AI Server Power Supply Market Growth 2026-2032

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Abstracts

The global AI Server Power Supply market size is predicted to grow from US\$ 2088 million in 2025 to US\$ 7911 million in 2032; it is expected to grow at a CAGR of 21.4% from 2026 to 2032.

In 2025, global AI Server Power Supply capacity 4,200 k Units, sales reached approximately 4,130 k Units, with an average market price of around 517 USD/Unit, industrial gross margin 31%.

AI server AC-DC power supplies are rapidly evolving from a generic infrastructure component into a strategic bottleneck for AI data centers. Compared with traditional server PSUs, AI Server Power Supply must support far higher rack power, highly dynamic GPU workloads, and compliance with new standards such as OCP ORV3. The competitive landscape is led by Taiwanese ODMs and global power specialists?Delta, Lite-On, AcBel together with OmniOn Power, Advanced Energy?plus rising Chinese vendors focused on AI racks, all centered on 3?5.5 kW CRPS/ORV3 modules and 33 kW rack power shelves.

From a technology standpoint, AI Server Power Supply typically features wide-range single-phase or three-phase AC inputs and 48?54 V DC bus outputs. Multi-stage topologies (PFC plus high-frequency LLC or similar) push system efficiency toward titanium levels, with several 3?12 kW reference PSUs already demonstrating peak efficiencies around 97.5?98% at 230 VAC including fan power. Power ratings are migrating from legacy 3 kW units to 5.5 kW and beyond, while power density targets above 100 W/in? are accelerating the adoption of SiC and GaN devices in combination with advanced silicon MOSFETs. Digital control, PMBus telemetry, hot-swap, and N+1 redundancy are standard, enabling AI racks drawing tens of kilowatts to ride through

extreme transient loads without compromising stability.

On the application side, AI Server Power Supply now sits at the heart of rack-level power architectures rather than acting as a simple pluggable PSU. In ORV3-type 21-inch racks, a typical 33 kW power shelf combines six hot-swappable 5.5 kW modules feeding a 48V50 V busbar, which in turn supplies multiple GPU server nodes and cascaded 48-to-12 V converters and point-of-load VRs. This architecture underpins hyperscale AI training clusters and is rapidly expanding into HPC, quantitative finance, large-scale simulation and other high-density workloads. Some vendors bundle AI server AC-DC power shelves with rack-level DC distribution, liquid-cooling manifolds and integrated monitoring, turning the power train into a solution-level differentiator in major tenders for AI data center builds.

Across the value chain, upstream suppliers provide power semiconductors, magnetics and long-life capacitors; midstream players design and manufacture AI Server Power Supply modules and rack systems; downstream customers are server OEMs and hyperscale/enterprise data center operators. Midstream consolidation is reshaping the competitive field. A notable example is AcBel's acquisition of ABB's Power Conversion division—now operating as OmniOn Power—which brought telecom-grade rectifiers, DC power systems and strong North American data center relationships into AcBel's portfolio. This deal effectively combines high-volume ODM manufacturing strengths with mission-critical front-end power expertise, enhancing the industry's ability to deliver robust AI-class AC-DC power and end-to-end rack-level DC systems.

Looking ahead, three structural shifts will define the AI Server Power Supply market. First, 48 V rack architectures are becoming the default for high-power AI systems, displacing 12 V distribution by cutting current, reducing copper losses and freeing cable and connector headroom for higher compute density. Second, unit power and efficiency are moving up in lockstep: the industry is transitioning from 3x5.5 kW PSUs toward 8x12 kW and beyond, enabled by GaN and SiC devices that support higher switching frequencies and smaller magnetics, pushing power density and opening space for smarter monitoring and predictive maintenance. Third, at the facility level, emerging 800 V DC "grid-to-rack" designs are redefining how AC-DC conversion is partitioned between central infrastructure and rack power shelves; future AI data centers will rely on tighter coupling between AI server AC-DC power supplies, medium-voltage UPS, DC busbars and local energy storage to balance explosive AI workload growth with grid stability and sustainability targets.

LP Information, Inc. (LPI) ' newest research report, the "AI Server Power Supply

Industry Forecast? looks at past sales and reviews total world AI Server Power Supply sales in 2025, providing a comprehensive analysis by region and market sector of projected AI Server Power Supply sales for 2026 through 2032. With AI Server Power Supply sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world AI Server Power Supply industry.

This Insight Report provides a comprehensive analysis of the global AI Server Power Supply 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 Server Power Supply portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global AI Server Power Supply market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AI Server Power Supply and breaks down the forecast by Power, 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 Server Power Supply.

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

Segmentation by Power:

Below 3 kW

3-5.5 kW

Above 5.5 kW

Segmentation by Certification:

Titanium Grade

Platinum Grade

Segmentation by Voltage:

12V

24V

48V

Others

Segmentation by Application:

GPU Server

ASIC Server

FPGA Server

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

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.

Delta Electronics

LITEON Technology

Acbel Polytech

Chicony Power Technology

Advanced Energy

Shenzhen Megmeet Electrical

Shenzhen Honor Electronic

Aohai Technology

China Greatwall Technology

FSP Group

Phihong

Murata

Shenzhen Gospower

Zippy Technology

SilverStone

Beijing Dynamic Power

Huawei

Mean Well

Salcomp

Key Questions Addressed in this Report

What is the 10-year outlook for the global AI Server Power Supply market?

What factors are driving AI Server Power Supply market growth, globally and by region?

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

How do AI Server Power Supply market opportunities vary by end market size?

How does AI Server Power Supply break out by Power, by Application?

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