

Global AI Server Rack-Level Power System Market Growth 2026-2032

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Abstracts

The global AI Server Rack-Level Power System market size is predicted to grow from US\$ 1968 million in 2025 to US\$ 4456 million in 2032; it is expected to grow at a CAGR of 12.4% from 2026 to 2032.

AI Server Rack-Level Power System refers to an integrated power delivery architecture specifically designed for high-density artificial intelligence server racks, providing power conversion, distribution, monitoring, protection, and backup functions for GPU servers, AI accelerators, CPUs, storage systems, networking equipment, and associated data center infrastructure. The system typically integrates high-power-density AC/DC power modules, rack power shelves, intelligent power distribution units (iPDU), 48V/54V DC power bus architectures, emerging 800V DC power delivery solutions, battery backup units (BBU), and intelligent energy management technologies. This market focuses on rack-level power solutions capable of supporting the increasing power density requirements of AI computing clusters, enabling high efficiency, high reliability, and scalable power management for next-generation AI data centers.

Key Findings

AI server rack-level power systems reached approximately 40 thousand units in global production in 2025

The global average selling price reached approximately US\$50 thousand per rack-level power system in 2025

Global production capacity reached approximately 50 thousand units in 2025 supporting AI infrastructure expansion

Average industry gross margin reached approximately 34% driven by high-power density requirements

48V DC and emerging 800V DC architectures are becoming key technology directions for AI data center power systems

Market Trends

AI server rack-level power systems are undergoing rapid technological evolution driven by the continuous increase in GPU computing power consumption and AI cluster deployment density. Traditional AC power architectures are gradually being upgraded toward higher efficiency DC power delivery systems, with 48V/54V rack-level DC architectures becoming increasingly adopted in high-performance AI servers. Meanwhile, 800V DC power systems are emerging as a future-oriented solution for ultra-high-density AI data centers, supporting rack power levels beyond traditional server infrastructure limitations. The integration of intelligent power monitoring, digital energy management, modular power supplies, and battery backup technologies is also accelerating as operators seek improved energy efficiency, operational reliability, and simplified maintenance. Future product development will focus on higher power density, improved conversion efficiency, modular scalability, and deeper integration with liquid cooling and AI data center infrastructure management systems.

Market Dynamics

Drivers

The primary growth driver of AI server rack-level power systems is the rapid expansion of AI computing infrastructure, particularly large-scale GPU clusters, generative AI platforms, and enterprise AI data centers. Increasing rack power requirements caused by advanced AI accelerators are creating demand for higher-capacity power delivery solutions. The transition from conventional server power architectures toward rack-level DC distribution is further supported by the need to reduce power conversion losses, improve energy efficiency, and optimize data center operating costs. The development of hyperscale cloud computing, AI model training platforms, and high-performance computing facilities continues to accelerate adoption of advanced rack-level power systems.

Restraints

The market faces limitations from high initial investment requirements, complex infrastructure upgrades, and compatibility challenges with existing data center power architectures. The adoption of advanced DC power systems requires changes in facility-level electrical infrastructure, operational standards, and maintenance capabilities. In addition, high-power rack systems require strict thermal management, safety protection, and reliability validation, increasing engineering complexity and deployment costs. Supply chain constraints for high-performance power semiconductors, magnetic components, and advanced power modules may also influence large-scale commercialization.

Opportunities

The transition toward next-generation AI data centers creates significant opportunities for suppliers developing high-efficiency DC power architectures, modular rack power systems, and integrated energy management solutions. The emergence of 800V DC architectures provides new growth opportunities for companies capable of delivering ultra-high-power conversion technologies. Integration between rack power systems, liquid cooling infrastructure, battery backup units, and intelligent data center management platforms is expected to create new solution-based business opportunities. Regional expansion of AI infrastructure investment in North America, China, Europe, Japan, and Southeast Asia will further support market development.

Challenges

The major industry challenges include rapidly changing AI hardware power requirements, technology standard uncertainty, and the need for continuous innovation in power conversion efficiency. AI server platforms are evolving quickly, requiring power system suppliers to frequently upgrade product designs and increase power density. The lack of unified standards for emerging high-voltage DC architectures may slow adoption in certain markets. Additionally, competition from global electrical equipment manufacturers and specialized power electronics suppliers requires companies to maintain strong engineering capabilities, manufacturing efficiency, and customer collaboration.

Industry Chain Analysis

The AI server rack-level power system industry chain consists of upstream power electronic components, midstream system manufacturers, and downstream AI data center operators. Upstream suppliers provide key components including power semiconductor devices, magnetic materials, capacitors, transformers, battery cells,

thermal management components, and embedded control systems. Midstream companies integrate AC/DC conversion modules, rack power shelves, intelligent distribution systems, BBU solutions, and monitoring platforms into complete rack-level power architectures. Downstream applications are concentrated in hyperscale data centers, cloud computing providers, AI research facilities, enterprise AI infrastructure, and high-performance computing environments. Value creation mainly depends on power efficiency improvement, reliability enhancement, system integration capability, and adaptation to next-generation AI computing platforms.

Value Chain Analysis

The value chain of AI server rack-level power systems is centered on advanced power conversion technology, system integration, and data center deployment capability. Component suppliers contribute through semiconductor performance, energy efficiency, and reliability improvement. System manufacturers create value by integrating power modules, intelligent controls, protection mechanisms, and rack-level architectures. Solution providers and data center operators focus on deployment optimization, energy management, and lifecycle operation efficiency. Companies with strong capabilities in power electronics, thermal management coordination, and large-scale data center engineering are positioned to capture higher-value segments.

Segment Insights

By power architecture, traditional AC PSU architectures remain widely deployed due to compatibility with existing data center infrastructure, while 48V DC rack-level power systems represent the major transition direction for AI server environments because of improved efficiency and reduced transmission losses. Emerging 800V DC AI data center power systems are expected to become an important technology pathway for future ultra-high-density AI clusters. By power rating, higher-power systems above 5.5kW represent the fastest-growing segment as AI servers increasingly adopt high-performance GPUs and accelerator architectures. Rack-level power solutions are shifting from independent power supply products toward integrated infrastructure platforms combining power conversion, backup, monitoring, and intelligent management functions.

Downstream Market Opportunities

The downstream market is primarily driven by AI computing infrastructure customers, including hyperscale cloud providers, AI model training centers, enterprise data centers,

and high-performance computing facilities. GPU AI servers represent the largest application segment due to their high power consumption and rapid deployment in generative AI workloads. TPU, NPU/ASIC, and FPGA-based AI servers are also creating additional demand as customized AI acceleration architectures expand. Future opportunities will emerge from AI factories, autonomous driving computing centers, scientific computing platforms, and next-generation edge AI infrastructure requiring higher reliability and power density.

Regional Insights

North America represents one of the leading regions for AI server rack-level power system adoption, supported by strong hyperscale cloud investment, advanced data center infrastructure, and rapid deployment of AI computing facilities. The region has strong demand for high-power rack architectures and advanced power management solutions. China represents another major market supported by expanding AI infrastructure construction, domestic cloud computing development, and increasing demand for high-performance computing. Europe, Japan, South Korea, Taiwan, and Southeast Asia are also important markets, with competition focused on energy efficiency, localized supply chains, and advanced power technology capabilities.

Competitive Landscape Analysis

The competitive landscape of AI server rack-level power systems includes global electrical equipment leaders, specialized power electronics manufacturers, and data center infrastructure suppliers. Companies such as Schneider Electric, Vertiv, Eaton, Delta Electronics, Lite-On, AcBel, Advanced Energy, and FSP Group have established capabilities in power conversion, data center power infrastructure, and high-efficiency energy solutions. Chinese suppliers including Megmeet, Shenzhen Honor Electronic, China Greatwall Technology, and Shenzhen Gospower are strengthening their positions through high-power density power modules and AI data center applications. Competition is increasingly focused on conversion efficiency, rack-level integration capability, intelligent monitoring, manufacturing scalability, and the ability to support future 800V DC AI infrastructure.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the "AI Server Rack-Level Power System Industry Forecast" looks at past sales and reviews total world AI Server Rack-Level Power System sales in 2025, providing a comprehensive analysis by region and

market sector of projected AI Server Rack-Level Power System sales for 2026 through 2032. With AI Server Rack-Level Power System sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world AI Server Rack-Level Power System industry.

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AI Server Rack-Level Power System 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 Server Rack-Level Power System.

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

Market Segmentation

Segmentation by Type:

Traditional AC PSU Architecture

48V DC Rack-Level Power System

800V DC AI Data Center Power System

Segmentation by Power Rating:

<3 kW

3-5.5kW

>5.5kW

Segmentation by Application:

GPU AI Servers

TPU Servers

NPU / ASIC AI Servers

FPGA AI Servers

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.

Schneider Electric

Vertiv

Eaton

Lite-On

AcBel

Delta Electronics

Legrand

Shenzhen Megmeet Electrical

Advanced Energy

Shenzhen Honor Electronic

China Greatwall Technology

FSP Group

Murata

Shenzhen Gospower

Artesyn Technologies

Key Questions Addressed in this Report

What is the 10-year outlook for the global AI Server Rack-Level Power System market?

What factors are driving AI Server Rack-Level Power System market growth, globally and by region?

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

How do AI Server Rack-Level Power System market opportunities vary by end market size?

How does AI Server Rack-Level Power System break out by Type, by Application?

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