

Global AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules Market Growth 2026-2032

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Abstracts

The global AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules market size is predicted to grow from US\$ 1516 million in 2025 to US\$ 9493 million in 2032; it is expected to grow at a CAGR of 27.5% from 2026 to 2032.

AI training cluster rack-level rectifier modules and power shelf PSU modules refer to modular power-conversion units deployed in AI training clusters, high-performance computing racks, GPU-accelerated racks, OCP ORv3 / ORv3 HPR architectures and comparable high-density data-centre power systems. These products are typically supplied as hot-swappable PSUs, rectifier modules, front-end power modules or power-shelf-integrated conversion units. Their core function is to convert single-phase AC, three-phase AC or high-voltage DC input into rack-level 48V, 50V or 54V DC bus output, while supporting current sharing, N+1 or N+N redundancy, PMBus / I²C / Redfish communication, EDPP peak-load response, black-box fault logging and remote monitoring.

Typical commercial configurations include 3kW, 5.5kW and 6kW hot-pluggable modules, as well as 18kW, 33kW and higher-power shelves assembled from multiple PSU modules. Indicative transaction pricing for 3kW-5.5kW modules is generally in the several-hundred-dollar to low-four-digit-dollar range per module, while complete 33kW power shelf systems command materially higher pricing depending on certification level, input architecture, cooling design, firmware customisation and procurement scale.

Based on our research, AI training cluster rectifier modules should be understood as rack-level power-conversion building blocks rather than generic telecom rectifiers, consumer PSUs or facility-level UPS equipment. The core product boundary is the hot-

swappable PSU or rectifier module installed in a power shelf, converting AC or high-voltage DC input into 48V, 50V or 54V rack-level DC output for GPU trays, AI servers, switch shelves and high-density compute nodes. The present industry architecture is largely shaped by OCP ORv3 and ORv3 HPR, where 18kW and 33kW shelves typically aggregate multiple 3kW or 5.5kW modules. Relative to conventional server PSUs, these modules place greater emphasis on rack-level current sharing, blind-mate connectivity, dynamic peak-load response, remote management, fault logging, high conversion efficiency and redundancy. Therefore, this report adopts a narrow market definition: general-purpose UPS systems, PDUs, connectors, busbars, board-level DC/DC devices and ordinary telecom rectifiers are excluded from the revenue model unless there is clear evidence that they are deployed as AI/HPC rack-level power shelf modules.

From a supply-side perspective, the global market is led by Taiwanese power-electronics manufacturers, supported by US and European data-centre infrastructure vendors, Japanese high-reliability power suppliers and an emerging group of Chinese vendors. Delta, Lite-On, AcBel, Chicony Power and Compuware have strong foundations in server PSUs, ODM collaboration and high-efficiency manufacturing. Advanced Energy benefits from its Artesyn heritage and a clear OCP-compliant product portfolio. Vertiv, Eaton and Schneider Electric are approaching the segment from the broader data-centre power infrastructure layer, integrating rack-level DC power shelves into AI and HPC deployment architectures. Murata provides OCP-compatible centralized power systems with a strong reliability and component-engineering background. In mainland China, Gospower has disclosed AI server power and power shelf products on its official website, while Megmeet appears to be positioning itself around advanced data-centre power and 800V DC solutions; however, product-level disclosure and revenue attribution still require further verification.

Demand is being driven by three structural forces: the rising power density of GPU racks, the rapid build-out of hyperscale and neocloud training clusters, and the retrofitting of legacy data centres into AI-ready environments. As rack power moves from tens of kilowatts towards 100kW and beyond, power shelves are becoming a key constraint and a key opportunity. They determine not only electrical conversion efficiency but also rack space, thermal load, serviceability and reliability. NVIDIA's 800V DC initiative highlights the longer-term limitation of today's 54V rack power distribution in very high-power AI factories, especially in relation to copper mass, space consumption and repeated conversion losses. This does not eliminate the near-term opportunity for 48V/54V power shelf modules; rather, it suggests that the market will evolve from 3kW and 5.5kW ORv3 modules toward higher-power modules, liquid-

cooled power supplies, rack-level energy buffering and eventually higher-voltage DC architectures.

The competitive logic of the sector will increasingly depend on system capability rather than standalone PSU manufacturing. Key differentiators include high conversion efficiency, Ruby-class certification, 5.5kW-to-18kW module roadmaps, EDPP response, liquid-cooling compatibility, telemetry, firmware customisation, OCP/NVIDIA ecosystem alignment, supply-chain resilience and global manufacturing footprint. The market remains in a high-growth phase for 2025-2027, but it is not structurally static. Suppliers that remain confined to conventional 48V modules may face architectural displacement if 800V HVDC moves into mass deployment after 2027. Conversely, suppliers able to bridge current ORv3/HPR power shelves with future high-voltage DC and liquid-cooled architectures are likely to command higher strategic value.

LP Information, Inc. (LPI) 's newest research report, the "AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules Industry Forecast" looks at past sales and reviews total world AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules sales in 2025, providing a comprehensive analysis by region and market sector of projected AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules sales for 2026 through 2032. With AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules industry.

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules and breaks down the forecast by Product Form Factor, 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 Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules.

This report presents a comprehensive overview, market shares, and growth opportunities of AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules market by product type, application, key manufacturers and key regions and countries.

Segmentation by Product Form Factor:

Hot-swappable Rectifier / PSU Module

Power Shelf Assembly

Integrated Rack DC Power System

Other

Segmentation by Output Voltage:

48V DC Output

50V DC Output

54V DC Output

Configurable Output

Other

Segmentation by Input Architecture:

Single-phase AC Input

Three-phase AC Input

HVDC Input

Hybrid Input

Segmentation by Cooling Method:

Air-cooled PSU

Hybrid-cooled PSU

Liquid-cooled PSU / Power Shelf

Immersion-compatible PSU

Segmentation by Application:

AI Training GPU Rack

HPC Cluster Rack

Hyperscale Data Center Rack

AI-ready Retrofit Rack

Other

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, Inc.

LITE-ON Technology Corporation

Advanced Energy Industries, Inc.

Vertiv Holdings Co.

AcBel Polytech Inc.

Compuware Technology Inc.

Chicony Power Technology Co., Ltd.

Murata Manufacturing Co., Ltd.

Eaton Corporation plc

Schneider Electric SE

FSP Technology Inc.

Guangdong Gospower Electric Technology Co., Ltd.

Shenzhen Megmeet Electrical Co., Ltd.

Bel Fuse Inc.

OmniOn Power Inc.

Key Questions Addressed in this Report

What is the 10-year outlook for the global AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules market?

What factors are driving AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules market growth, globally and by region?

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

How do AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules market opportunities vary by end market size?

How does AI Training Cluster Rack-Level Rectifier Modules and Power Shelf PSU Modules break out by Product Form Factor, by Application?

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