

Global Data Center Solid-State Transformer Market Growth 2026-2032

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Abstracts

The global Data Center Solid-State Transformer market size is predicted to grow from US\$ 34.73 million in 2025 to US\$ 726 million in 2032; it is expected to grow at a CAGR of 32.4% from 2026 to 2032.

The Solid-State Transformer (SST) for data centers is a new type of power electronic device that replaces traditional power-frequency transformers. It achieves efficient power conversion and intelligent regulation based on fully controllable power electronic components and high-frequency magnetic coupling technology.

It not only provides voltage step-up/step-down and AC-DC conversion functions but also integrates reactive power compensation, harmonic mitigation, fault isolation, and multi-energy access capabilities, serving as the core component for building efficient, flexible, and green power supply and distribution systems in data centers. Its operating principle involves rectifying the input AC power into DC, performing voltage conversion through high-frequency isolation, and finally inverting it back to the required AC or DC voltage output. For example, a data center solid-state transformer can rectify a 10kV input voltage before inverting it to generate high-frequency AC voltage. This voltage is then stepped down to low-voltage high-frequency power via an internal miniature high-frequency transformer. Finally, a rear-end DC-AC converter outputs the required 400V, $\pm 400V$, or two-wire 800V power for the data center.

In 2025, global Data Center Solid-State Transformer production reached approximately 46.6MW with an average global market price of around 762 USD/KW. The production capacity for Data Center Solid-State Transformer in 2025 was approximately 50MW. The typical gross profit margin for Data Center Solid-State Transformer is between 20% and 40%.

Development Trends

Continuously Improving Efficiency: With ongoing advancements in power semiconductor devices and control technologies, the efficiency of data center solid-state transformers will further increase, promising higher energy efficiency levels.

Increasing Power Density: Through the adoption of new materials and optimized designs, the volume and weight of solid-state transformers will continue to decrease while power density steadily increases, meeting the growing high-power-density demands of data centers.

Enhanced Intelligence: Equipped with stronger intelligent operation and maintenance capabilities, these transformers enable real-time power flow optimization and self-healing from faults, improving the reliability and stability of data center power supply systems.

Growth Drivers

Policy Impulsion: Global initiatives like the “dual carbon” goals and the “East Data West Computing” project impose stringent PUE requirements on data centers, driving rapid growth in market demand for solid-state transformers.

Market Demand Expansion: Exponential growth in AI computing power demands higher efficiency and redundancy from data center power systems. As a key solution to power challenges, solid-state transformers will see continuously expanding market demand.

Technological Advancements: Continuous progress in power semiconductors, high-frequency magnetic coupling, and related technologies will reduce solid-state transformer costs while enhancing performance and reliability, accelerating market adoption and application.

Upstream and Downstream Influence Drivers

Upstream Influence Drivers: Technological advancements and cost reductions in upstream industries like power semiconductors, magnetic components, and materials will provide robust support for the development of data center solid-state transformers. For instance, improved performance and reduced costs of silicon carbide (SiC) devices will drive solid-state transformers toward higher efficiency and greater power density.

Downstream Impact Drivers: The rapid expansion of downstream sectors like data centers and renewable energy imposes heightened demands on power supply efficiency, flexibility, and reliability, directly stimulating market demand for data center solid-state transformers. For instance, the continuous increase in per-cabinet power consumption within data centers necessitates more efficient power delivery equipment, making solid-state transformers a key technology for achieving this objective.

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

This Insight Report provides a comprehensive analysis of the global Data Center Solid-State Transformer 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 Data Center Solid-State Transformer portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Data Center Solid-State Transformer market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Data Center Solid-State Transformer 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 Data Center Solid-State Transformer.

This report presents a comprehensive overview, market shares, and growth opportunities of Data Center Solid-State Transformer market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Single-port SST

Multi-port SST

Segmentation by Input Method:

AC-DC

DC-DC

Segmentation by Semiconductor Devices:

IGBT SST

SiC MOSFET SST

Segmentation by Application:

Enterprise Data Centers

Housing and Service Provider Data Centers

Hyperscale Data Centers

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.

Eaton

Delta

Amperesand

SolarEdge

Vertiv

TBEA

China XD Electric

JST Power Equipment

Newonder Special Electric

TGOOD Electric

Sifang Automation

Kehua

Schneider Electric

Kerun Intelligent Control

Eaglerise

WG Energy

Key Questions Addressed in this Report

What is the 10-year outlook for the global Data Center Solid-State Transformer market?

What factors are driving Data Center Solid-State Transformer market growth, globally and by region?

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

How do Data Center Solid-State Transformer market opportunities vary by end market size?

How does Data Center Solid-State Transformer break out by Type, by Application?

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