

# Global Datacenter Electric DC-DC Converter Market Growth 2026-2032

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## Abstracts

The global Datacenter Electric DC-DC Converter market size is predicted to grow from US\$ 1754 million in 2025 to US\$ 8695 million in 2032; it is expected to grow at a CAGR of 25.4% from 2026 to 2032.

Data center DC-DC converters refer to power electronic conversion devices used in data center power architectures to perform power conversion, voltage regulation, and power management between different DC voltage levels, and are typically delivered as finished DC-DC converter products that can be independently procured and deployed. These products mainly include board-mounted DC-DC modules and rack-level DC-DC converter units, and are used in applications such as server and accelerated computing power supply, rack and cabinet-level power distribution and conversion, energy storage and backup power interface conversion, and networking and communications equipment power supply. In 2025, global production of data center DC-DC converters reached 4.98 million units, with an average ex-factory price of USD 36 per unit.

Data center DC-DC converters are a key power electronics component in data center power architectures, primarily used for power conversion, voltage regulation, and power management between different DC voltage levels. Typical applications include server and accelerated computing power supply, rack- and cabinet-level power distribution and conversion, energy storage and backup power interface conversion, and networking and communications equipment power supply. With the rapid growth of AI training and inference workloads, continued increases in server power density, and the accelerating adoption of 48V intermediate bus architectures in data centers, demand is shifting from traditional general-purpose DC-DC module markets toward data center-specific converters featuring higher power density, higher efficiency, and higher reliability, creating strong structural growth characteristics. In terms of regional structure, North

America, China, and other active data center buildout markets in Asia-Pacific are the main demand regions. North America remains the leading market, driven by hyperscale cloud capital expenditure, while China is growing rapidly, supported by computing infrastructure expansion and local server supply-chain development. From a product structure perspective, the industry is characterized by board-mounted DC-DC modules as the main shipment volume contributor and rack-/cabinet-level DC-DC converter units as the main value contributor, forming a market structure in which high-volume modular products coexist with low-volume, high-ASP system-level products. Board-mounted DC-DC modules are widely deployed in server motherboards, power boards, and AI accelerator boards and serve as the core driver of shipment volume. Rack- and cabinet-level DC-DC converter units are used more often in high-power rack distribution and power architecture upgrades; they feature higher unit prices and longer validation cycles, and their revenue contribution is higher than their shipment share. By technology and topology, products can be further categorized into isolated and non-isolated types, which differ in their trade-offs among efficiency, size, EMC, and safety design, and they serve different roles across voltage architectures and application layers. As power density rises and thermal design constraints tighten, high-efficiency topologies, digital control, high-frequency magnetic components, and advanced packaging are becoming the core directions of product iteration. From an application structure perspective, servers and AI accelerated computing equipment remain the largest source of demand, while networking switches, storage systems, and parts of rack-level power chains provide important supplementary demand. Industry demand comes not only from new server shipments and new data center rack deployments, but also from power architecture retrofits in existing data centers aimed at improving power efficiency, reducing losses, and supporting higher-power loads. As AI server penetration increases, the number of mid- to high-power DC-DC modules required per server is rising, driving up value per device. In terms of cost structure, product costs mainly consist of power semiconductor devices, magnetic components, control and driver chips, PCBs, and structural thermal management components, among which power devices and magnetic components have the greatest impact on efficiency, thermal performance, and cost. At the same time, high-power-density products require stricter testing, burn-in, and reliability verification, making manufacturing and quality-related costs a meaningful portion of total cost. From the manufacturing side, data center DC-DC converters are power products with both high design barriers and high manufacturing barriers. Leading suppliers typically possess platform-based product development capabilities, automated assembly, full-process testing, and reliability verification capabilities. Single-line capacity varies significantly by product mix: for board-mounted DC-DC module production lines, single-line capacity is typically in the range of hundreds of thousands to several million units per year, and highly automated

standardized lines for mature models can reach even higher levels; for rack-/cabinet-level DC-DC converter units, due to higher power ratings and greater assembly and testing complexity, single-line capacity is typically in the range of several thousand to tens of thousands of units per year. Industry gross margin is generally at a medium-to-high level, typically around 20%–40%. Standardized mid-power modules tend to be closer to the mid-range, while high-power-density, high-reliability data center-specific modules and system-level converter units with stronger customer certification barriers tend to have higher gross margins. Products with higher commoditization and more intense price competition tend to have lower gross margins. As AI-related demand grows and product mix shifts upward, the industry's average gross margin has some support, although it can still be affected by upstream component price fluctuations and pricing pressure caused by high customer concentration. In terms of industry chain structure and competitive landscape, upstream suppliers include power semiconductors, control chips, magnetic materials, and structural thermal management components; the midstream consists of DC-DC module and converter unit manufacturers; and downstream customers include server OEMs/ODMs, networking equipment manufacturers, system integrators, and data center operators. In the global market, international power module suppliers still maintain advantages in high-end data center application scenarios through accumulated technology, customer certifications, and delivery experience, while some Chinese manufacturers are accelerating penetration in mid- to high-power board-mounted modules and local supporting supply, improving competitiveness through response speed, cost control, and customization capabilities. Overall, industry concentration is higher than that of general industrial power subsegments, but a long tail of suppliers still exists, especially in general-purpose modules and regional customer markets where competition remains relatively fragmented. Future industry trends will mainly center on higher power density, architecture upgrades, and more segmented application scenarios. On one hand, AI and high-performance computing will continue to increase server and rack power density, driving demand for mid- to high-power DC-DC modules. On the other hand, the rollout of 48V intermediate bus and higher-voltage DC distribution architectures will accelerate the penetration of bus converters, isolated high-power DC-DC converters, and rack-level converter units. At the same time, rising requirements from data center operators for energy efficiency, reliability, and maintenance convenience will push products toward higher efficiency, better monitoring capability, and easier maintenance. Overall, the data center DC-DC converter industry has both strong technology-driven and demand-driven characteristics and is expected to maintain solid growth and product mix optimization potential during the computing infrastructure upgrade cycle.

LP Information, Inc. (LPI) ' newest research report, the “Datacenter Electric DC-DC

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

This Insight Report provides a comprehensive analysis of the global Datacenter Electric DC-DC Converter 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 Datacenter Electric DC-DC Converter portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Datacenter Electric DC-DC Converter market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Datacenter Electric DC-DC Converter 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 Datacenter Electric DC-DC Converter.

This report presents a comprehensive overview, market shares, and growth opportunities of Datacenter Electric DC-DC Converter market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Isolated

Non-isolated

Segmentation by System Level:

Board-mounted DC-DC Modules

## Rack-level DC-DC Converter Units

### Segmentation by Sales Channel:

Direct Sales

Distribution

### Segmentation by Application:

Server and Accelerated Computing Power Supply

Rack and Cabinet-level Power Conversion

Energy Storage and Backup Power Interface Conversion

Networking and Communications Equipment Power Supply

### 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.

Advanced Energy

Vicor

Flex Power Modules

Delta Electronics

Murata

Bel Power Solutions

Beijing Xinleineng Technology Co., Ltd.

TDK

XP Power

Boda Technology Co., Ltd.

Jinshengyang Technology

Cosel

Bohan

Xingkang Electronics

Sichuan Shenghua Power Technology Co., Ltd.

Eaton

#### Key Questions Addressed in this Report

What is the 10-year outlook for the global Datacenter Electric DC-DC Converter market?

What factors are driving Datacenter Electric DC-DC Converter market growth, globally and by region?

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

How do Datacenter Electric DC-DC Converter market opportunities vary by end market size?

How does Datacenter Electric DC-DC Converter break out by Type, by Application?

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