

Global High Voltage DC Power Distribution Units for AI Data Centers Market Growth 2026-2032

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Abstracts

The global High Voltage DC Power Distribution Units for AI Data Centers market size is predicted to grow from US\$ 419 million in 2025 to US\$ 1263 million in 2032; it is expected to grow at a CAGR of 11.2% from 2026 to 2032.

High Voltage DC Power Distribution Units for AI Data Centers are critical power supply and distribution equipment designed for high-power GPU server clusters, liquid-cooled AI racks, supercomputing centers, and cloud data centers. Their core role is to establish a higher-voltage DC distribution path between traditional AC power input, rectifier modules, energy storage backup units, and server racks, thereby reducing cable losses, copper consumption, conversion losses, and cabinet space pressure caused by high-current transmission. These products are commonly delivered as power sidecars, DC distribution cabinets, rack busbars, output protection and control modules, integrated rectifier and distribution systems, or rack-level DC distribution strips. Typical voltage systems include 240 V, 336 V, 380 V, ± 400 V, and 800 V. Key functions include AC input connection, DC rectification, busbar aggregation, branch output, fuse or circuit-breaker protection, output switching, hot-swap maintenance, energy metering, status telemetry, short-term backup integration, and remote management. As AI server rack power moves from tens of kilowatts toward hundreds of kilowatts and even megawatt levels, traditional low-voltage DC and multi-stage AC conversion architectures face bottlenecks in efficiency, space utilization, thermal management, and operations. By raising distribution voltage, reducing conversion stages, strengthening protection and control, and supporting modular expansion, high-voltage DC power distribution units provide AI data centers with higher power density, lower losses, faster deployment, and stronger maintainability.

The power system of AI data centers is gradually shifting from traditional AC distribution

and low-voltage DC architecture toward high-voltage DC distribution designed for high-density racks. The fundamental driver is the rapid increase in per-rack power for GPU clusters and accelerated computing platforms. Existing multi-stage AC conversion, low-voltage high-current transmission, and distributed rack power delivery methods are facing growing pressure in copper consumption, cabling space, conversion losses, thermal management, and maintenance complexity. High-voltage DC power distribution units raise the distribution voltage to levels such as 240 V, 336 V, 380 V, ± 400 V, or 800 V, significantly reducing transmission current at the same power level and providing a unified platform for DC busbars, output protection, intelligent metering, and backup power integration. As open standards, GPU platform roadmaps, and hyperscale data center construction cycles become more aligned, power sidecars, DC busbars, output protection and control modules, and rack-level distribution units will become important components of AI computing infrastructure.

Industry competition will evolve along two parallel paths. One path is the 800 VDC ecosystem for future megawatt-scale AI racks, emphasizing high-voltage DC sidecars, modular power shelves, solid-state or fast protection devices, energy storage integration, remote telemetry, and system-level safety validation. This path mainly serves newly built large-scale AI data centers and next-generation GPU platforms. The other path targets existing telecom facilities, intelligent computing centers, supercomputing centers, and large data centers using 240 V, 336 V, and 380 V DC power systems, with a stronger focus on reliability, engineering maturity, domestic supply, maintenance convenience, and retrofit deployment. The competitive barriers of the former lie in standards participation, platform collaboration, and high-voltage protection technologies, while those of the latter lie in long-term project references, customer operation systems, and local delivery capabilities. These two paths are not mutually exclusive; instead, they jointly drive higher penetration of DC power supply across different construction phases, customer budgets, and power-density requirements.

Looking ahead, high-voltage DC power distribution units will no longer be merely a technical upgrade of data center distribution cabinets. They will become a key lever for improving energy efficiency, scalability, and deployment speed in AI data centers. AI training clusters require high power density, continuous power supply, and rapid deployment, which means power distribution systems must be deeply integrated with liquid cooling, energy storage, busbars, intelligent operations, and modular construction. Future customers will pay more attention to system efficiency, output capacity, hot-swap safety, fault isolation, online monitoring, backup compatibility, and expansion convenience rather than simply comparing the price of a single device. As AI computing

centers expand from a limited number of hyperscale projects to regional, industry-level, and enterprise-level applications, companies with high-voltage DC distribution, engineering integration, protection control, and lifecycle service capabilities will continue to gain opportunities in both new high-density facilities and retrofit projects for existing data centers.

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

This Insight Report provides a comprehensive analysis of the global High Voltage DC Power Distribution Units for AI Data Centers 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 High Voltage DC Power Distribution Units for AI Data Centers portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global High Voltage DC Power Distribution Units for AI Data Centers market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for High Voltage DC Power Distribution Units for AI Data Centers and breaks down the forecast by Rated Voltage, 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 High Voltage DC Power Distribution Units for AI Data Centers.

This report presents a comprehensive overview, market shares, and growth opportunities of High Voltage DC Power Distribution Units for AI Data Centers market by product type, application, key manufacturers and key regions and countries.

Segmentation by Rated Voltage:

240 V

336 V

380 V

800 V

Segmentation by Output Capacity:

Below 100 kW

100 kW to 400 kW

400 kW to 1 MW

Above 1 MW

Segmentation by Installation Position:

Room

Row

Sidecar

Rack

Segmentation by Application:

AI Training Cluster Power Supply

AI Inference Cluster Power Supply

Cloud Data Center Power Supply

Telecom Equipment Room Power Supply

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.

Flex Ltd.

Vertiv Group Corp.

ABB Ltd

Schneider Electric SE

Eaton Corporation plc

Delta Electronics, Inc.

LITE-ON Technology Corporation

Kehua Data Co., Ltd.

Hangzhou Zhongheng Electric Co., Ltd.

East Group Co., Ltd.

Huawei Digital Power Technologies Co., Ltd.

NTT FACILITIES, INC.

Key Questions Addressed in this Report

What is the 10-year outlook for the global High Voltage DC Power Distribution Units for AI Data Centers market?

What factors are driving High Voltage DC Power Distribution Units for AI Data Centers market growth, globally and by region?

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

How do High Voltage DC Power Distribution Units for AI Data Centers market opportunities vary by end market size?

How does High Voltage DC Power Distribution Units for AI Data Centers break out by Rated Voltage, by Application?

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