

Global On-board High-to-Low Voltage DC-DC Converter Market Growth 2026-2032

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Abstracts

The global On-board High-to-Low Voltage DC-DC Converter market size is predicted to grow from US\$ 873 million in 2025 to US\$ 1668 million in 2032; it is expected to grow at a CAGR of 9.8% from 2026 to 2032.

In 2025, global production capacity of on-board high-to-low voltage DC-DC converters reached approximately 78 million units, with actual output around 61 million units. The average selling price was about USD 165 per unit. Gross margins mainly ranged from 25% to 40%, supported by automotive-grade reliability requirements and power electronics integration. An on-board high-to-low voltage DC-DC converter is a power electronic device that converts high-voltage DC from a traction battery (typically 200–800 V) into low-voltage DC (12 V or 24 V) to supply auxiliary systems in electric and hybrid vehicles, such as lighting, infotainment, control units, and safety systems.

Upstream includes power semiconductor devices (MOSFETs, IGBTs, SiC devices), magnetic components, capacitors, controllers, PCBs, and automotive-grade connectors. The midstream focuses on DC-DC converter design, integration, packaging, software control, and automotive qualification. Downstream applications are primarily in battery electric vehicles (BEVs), plug-in hybrid vehicles (PHEVs), hybrid vehicles, and increasingly in commercial electric vehicles and special-purpose vehicles.

The on-board high-to-low voltage DC-DC converter market is expanding rapidly, driven by the global penetration of new energy vehicles. Higher vehicle electrification levels and the transition toward 800 V platforms are increasing power density and efficiency requirements for DC-DC converters. Automakers are shifting from discrete designs to highly integrated modules, sometimes combined with on-board chargers or power distribution units, to reduce weight and cost. The adoption of SiC devices further

improves efficiency and thermal performance. Although pricing pressure exists due to scale expansion, suppliers with strong automotive-grade design, mass production capability, and system integration expertise maintain solid margins. Overall, this market is a high-growth, technology-intensive segment closely tied to the long-term development of electric mobility.

LP Information, Inc. (LPI) ' newest research report, the “On-board High-to-Low Voltage DC-DC Converter Industry Forecast” looks at past sales and reviews total world On-board High-to-Low Voltage DC-DC Converter sales in 2025, providing a comprehensive analysis by region and market sector of projected On-board High-to-Low Voltage DC-DC Converter sales for 2026 through 2032. With On-board High-to-Low Voltage 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 On-board High-to-Low Voltage DC-DC Converter industry.

This Insight Report provides a comprehensive analysis of the global On-board High-to-Low Voltage 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 On-board High-to-Low Voltage 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 On-board High-to-Low Voltage DC-DC Converter market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for On-board High-to-Low Voltage 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 On-board High-to-Low Voltage DC-DC Converter.

This report presents a comprehensive overview, market shares, and growth opportunities of On-board High-to-Low Voltage DC-DC Converter market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Low Power (Below 1kW)

Medium Power (1-3kW)

High Power (Above 3kW)

Segmentation by Cooling Method:

Air-cooled DC-DC Converter

Liquid-cooled DC-DC Converter

Segmentation by Application:

Commercial Vehicles

Passenger Vehicles

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.

Bosch

Continental

Denso

Valeo

Vitesco Technologies

Mitsubishi Electric

Hitachi Astemo

Infineon Technologies

STMicroelectronics

Texas Instruments

Analog Devices

Vicor

onsemi

ROHM Semiconductor

Delta Electronics

Huawei Digital Power

BYD

Nidec Corporation

CATL

Key Questions Addressed in this Report

What is the 10-year outlook for the global On-board High-to-Low Voltage DC-DC Converter market?

What factors are driving On-board High-to-Low Voltage DC-DC Converter market growth, globally and by region?

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

How do On-board High-to-Low Voltage DC-DC Converter market opportunities vary by end market size?

How does On-board High-to-Low Voltage DC-DC Converter break out by Type, by Application?

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