

# Global Rack-Level Power Supply Systems Market Growth 2026-2032

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## Abstracts

The global Rack-Level Power Supply Systems market size is predicted to grow from US\$ 2191 million in 2025 to US\$ 7394 million in 2032; it is expected to grow at a CAGR of 19.1% from 2026 to 2032.

Rack-level power supply systems are integrated power platforms installed inside or immediately adjacent to server, storage, and networking racks. They typically combine a power shelf or rack, hot-swappable AC-DC or DC-DC power modules, busbars and distribution assemblies, a power management controller, and optional battery backup or power-capacitor units. Their primary function is to convert single-phase or three-phase AC, high-voltage DC, or other upstream feeds into stable 12 V, 48–54 V, or other rack DC bus outputs while providing redundant parallel operation, fault isolation, load sharing, telemetry, and short-duration ride-through. These systems support high-density IT equipment used in cloud, artificial intelligence, high-performance computing, telecommunications, and edge facilities with efficient, scalable, and serviceable power delivery. Products are commonly differentiated by rated output power, input architecture, rack form factor, and backup configuration, with key performance criteria including conversion efficiency, power density, transient response, redundancy level, hot-swap capability, and management interfaces. The blended gross margin is approximately 32%.

Rising rack power density from AI training and inference, high-performance computing, and cloud expansion is placing pressure on conventional server-level power supplies and low-capacity rack distribution through higher copper losses, constrained rack space, and more demanding transient loads. Hyperscale cloud operators, colocation providers, and large enterprises are increasingly centralizing power conversion and distribution at rack level to reduce conversion stages, accelerate deployment, and scale

capacity modularly across successive GPU and accelerator platforms.

Product development is centered on 48–54 V DC buses, OCP ORv3 and high-power rack architectures, with a gradual transition toward higher-voltage DC input and rack-side DC-DC conversion. Power shelves in the 33–72 kW range, hot-swappable modules, N+1 or N+N redundancy, coordinated battery and power-capacitor backup, digital telemetry, and liquid-cooling compatibility are becoming major competitive priorities. Wide-bandgap power devices, high-frequency magnetics, and advanced control algorithms are improving efficiency, power density, and dynamic-load performance.

North American demand is led by cloud and AI infrastructure investment, Asia has strong manufacturing depth in power modules, magnetics, racks, and system integration, and European customers place greater emphasis on energy efficiency, standards compliance, and serviceability. The market retains significant customization and qualification barriers because products must be validated with server platforms, busbars, backup systems, and thermal management. Rapid standards evolution, semiconductor and copper cost volatility, and customer concentration remain key risks, while 800 V DC architectures, megawatt-class racks, and integrated power-and-cooling platforms create new growth opportunities.

## Report Scope

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Rack-Level Power Supply Systems 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 Rack-Level Power Supply Systems.

This report presents a comprehensive overview, market shares, and growth opportunities of Rack-Level Power Supply Systems market by product type, application, key manufacturers and key regions and countries.

## Market Segmentation

### **Segmentation by Type:**

20 kW and Below

Above 20 kW to 40 kW

Above 40 kW to 80 kW

Above 80 kW

### **Segmentation by Input Power Architecture:**

Single-Phase AC Input

Three-Phase AC Input

High-Voltage DC Input

Multi-Input Systems

### **Segmentation by Rack Form Factor:**

19-Inch Rack Systems

21-Inch Open Rack Systems

19/21-Inch Compatible Systems

Other Rack Formats

## **Segmentation by Backup Configuration:**

Without Integrated Backup

Battery Backup Integrated

Capacitor Backup Integrated

Hybrid Backup Integrated

## **Segmentation by Application:**

Cloud Computing

Colocation Services

Enterprise IT

Telecommunications

Government and Research Computing

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.

Advanced Energy

Vertiv

Delta Electronics

Lite-On Technology

Murata Manufacturing

AcBel Polytech

FSP Group

Flex

Bel Power Solutions

Chicony Power Technology

Megmeet Electrical

Phihong Technology

ZTE

VAPEL

## **Key Questions Addressed in this Report**

What is the 10-year outlook for the global Rack-Level Power Supply Systems market?

What factors are driving Rack-Level Power Supply Systems market growth, globally and by region?

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

How do Rack-Level Power Supply Systems market opportunities vary by end market size?

How does Rack-Level Power Supply Systems break out by Type, by Application?

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