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Global SiC Power Modules for AI Data Center Power Market Growth 2026-2032

https://marketpublishers.com/r/G8C7791A98FCEN.html
Date: October 2026
Pages: 118
Price: US$ 3,660.00 (Single User License)
ID: G8C7791A98FCEN

Abstracts

The global SiC Power Modules for AI Data Center Power market size is predicted to grow from US$ 181 million in 2025 to US$ 1451 million in 2032; it is expected to grow at a CAGR of 31.6% from 2026 to 2032.

SiC Power Modules for AI Data Center Power are modular silicon carbide power semiconductor devices designed for high-power-density electrical distribution and power conversion in artificial intelligence data centers. They integrate SiC MOSFETs, SiC Schottky diodes, or hybrid Si/SiC devices on insulated substrates within power-module packages to support high-voltage, high-current, high-frequency, and low-loss switching. The market mainly covers voltage classes from approximately 650 V to 3.3 kV and configurations such as half-bridge, full-bridge, three-level, three-phase bridge, and buck/boost topologies. Key deployment points include front-end rectification, UPS and backup power, high-voltage DC buses, DC-DC conversion, energy-storage interfaces, and solid-state transformers serving AI data centers. The research scope focuses on SiC devices purchased and integrated as discrete power modules into data-center power equipment, with key evaluation parameters including rated voltage and current, conduction and switching losses, parasitic inductance, thermal resistance, insulation capability, power-cycling reliability, and package thermal performance. The estimated blended gross margin is approximately 38%.

Market Trends

AI rack power is moving from the hundred-kilowatt range toward megawatt-class designs, increasing copper losses, busbar size, and thermal stress in traditional low-voltage high-current distribution. This is pushing data-center power architectures toward higher DC bus voltages and fewer conversion stages. The role of SiC power modules is

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therefore expanding from incremental switching-loss reduction to enabling centralized 800 VDC systems, high-power UPS platforms, bidirectional energy-storage interfaces, and solid-state transformer architectures. Product development is concentrating on 1200 V and higher voltage classes, low-parasitic-inductance packages, sintered interconnects, high-thermal-conductivity insulated substrates, higher junction-temperature capability, and compatibility with liquid or enhanced cooling. Higher switching frequency also supports smaller magnetics and higher system power density.

Drivers

Rapid deployment of generative-AI training and inference clusters is making rack power density, conversion efficiency, and availability critical data-center constraints. High-efficiency SiC modules can reduce losses in AC-DC and high-voltage DC-DC stages while lowering cooling demand and passive-component size. In parallel, the move toward 800 VDC architectures, DC-coupled storage, and modular high-power UPS platforms is creating incremental demand for medium- and high-voltage SiC power modules.

Restraints

SiC substrates, epitaxy, and high-reliability packaging still carry a meaningful cost premium, while some server front-end stages must compete on total system cost with mature silicon MOSFET, IGBT, and GaN solutions. Module value also depends heavily on thermal design, gate-drive matching, and converter topology. Without simultaneous optimization of magnetics, cooling, and control, device-level efficiency gains may not fully translate into system-level economics.

Opportunities

The strongest opportunities are emerging in 800 VDC power sidecars, megawatt-class rack power systems, high-power bidirectional UPS and battery-backup platforms, centralized rectification, energy-storage interfaces, and medium-voltage solid-state transformers. As AI compute campuses expand from individual halls to multi-building high-density sites, SiC modules can move from component substitution toward architecture-level design-in, broadening the design window for 1200 V, 1700 V, and higher-voltage platforms.

Challenges

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AI data-center power architectures are still evolving rapidly, while standards for 800 VDC distribution, protection, connectors, and safety continue to mature. Customer requirements for redundancy, short-circuit protection, insulation, and thermal management vary substantially, leading to long qualification cycles and significant engineering customization. Continued SiC capacity expansion can also pressure device pricing, requiring suppliers to defend profitability through chip performance, packaging reliability, and stronger system-level support.

Industry Chain Analysis

Upstream inputs include SiC substrates and epitaxy, MOSFET and Schottky die, AMB/DBC insulated substrates, copper terminals, sintering materials, and encapsulation materials. Wafer yield, die area, and high-thermal-conductivity substrates remain major cost and performance factors. Module manufacturers create value through die paralleling, interconnect design, low-inductance current paths, insulation, thermal-path optimization, and reliability qualification such as power cycling and high-temperature/high-humidity testing. Downstream, modules are integrated into server power supplies, UPS systems, battery-backup and energy-storage equipment, high-voltage DC distribution, DC-DC converters, and solid-state transformers before deployment in AI data centers. As SiC die prices decline, more value is expected to migrate toward low-inductance packaging, double-sided or enhanced cooling, integrated sensing, and system co-design.

Segment Insights

By voltage class, 1200 V modules are expected to become the core segment for high-voltage DC and high-power conversion in AI data centers. The 650–750 V range remains relevant to selected conventional AC front ends and lower-bus-voltage platforms, while 1700 V and higher devices are better positioned for facility-level conversion and emerging solid-state transformer stages. By device integration, full-SiC MOSFET modules are gaining fastest in efficiency- and power-density-driven projects, while hybrid SiC solutions retain a cost advantage in selected UPS and industrialized power platforms. Current ratings are also moving upward, with growing demand above 300 A as centralized converters seek fewer parallel modules and higher power per building block.

Downstream Market Opportunities

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Hyperscale AI data centers remain the primary early adopters because they upgrade power architectures quickly, operate the highest rack densities, and place a high economic value on conversion losses. Colocation operators are following as they host larger GPU clusters and upgrade electrical infrastructure for high-density tenants. Enterprise and edge data centers are likely to adopt more gradually, but private AI clusters, low-latency inference, and regional compute nodes should create additional demand.

Regional Insights

North America remains the largest near-term market, supported by hyperscale cloud investment, GPU cluster deployment, and new AI campuses, and it is likely to lead early adoption of 800 VDC and megawatt-class rack architectures. Asia-Pacific combines expanding data-center capacity with a strong server, power-supply, and power-semiconductor manufacturing base, supporting localized sourcing across China, Japan, Korea, and Southeast Asia. Europe is smaller in absolute deployment but has strong incentives around energy efficiency, grid constraints, and high-efficiency power electronics, supporting adoption of SiC modules and DC-oriented architectures.

Competitive Landscape Analysis

Competition combines integrated power-semiconductor suppliers with SiC wafer and device capabilities and specialized module manufacturers focused on packaging and topology flexibility. Leading suppliers are investing in 200 mm SiC manufacturing, 1200 V to 1700 V platforms, low-inductance packaging, and data-center reference designs, while module specialists compete through multi-source chip strategies, standardized footprints, and configurable circuit topologies. As AI data-center customers move from component selection toward system-level architecture co-design, qualification history, long-term reliability, capacity assurance, and joint optimization with gate drivers, controllers, and thermal systems are becoming more important than isolated chip specifications.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “SiC Power Modules for AI Data Center Power Industry Forecast” looks at past sales and reviews total world SiC Power Modules for AI Data Center Power sales in 2025, providing a comprehensive analysis by region and market sector of projected SiC Power Modules for AI Data Center Power sales for 2026 through 2032. With SiC Power Modules for AI Data Center Power sales

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broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world SiC Power Modules for AI Data Center Power industry.

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for SiC Power Modules for AI Data Center Power 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 SiC Power Modules for AI Data Center Power.

This report presents a comprehensive overview, market shares, and growth opportunities of SiC Power Modules for AI Data Center Power market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

650–750 V

900–1200 V

1700 V

2000 V and Above

Other

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Segmentation by Circuit Topology:

Half-Bridge / Phase-Leg

Full-Bridge

Three-Level

Three-Phase Bridge

Buck/Boost

Other

Segmentation by Device Integration:

Full-SiC MOSFET Modules

Hybrid SiC Modules

SiC Diode Modules

Other

Segmentation by Rated Current:

100 A and Below

101–300 A

301–600 A

Above 600 A

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Segmentation by Application:

Cloud and Colocation

Enterprise

Telecom

Government and Research

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

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- 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.

- Infineon Technologies
- Wolfspeed
- ROHM Semiconductor
- Onsemi
- STMicroelectronics

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Mitsubishi Electric

Fuji Electric

Semikron Danfoss

Microchip Technology

Vincotech

StarPower Semiconductor

MACMIC

Key Questions Addressed in this Report

What is the 10-year outlook for the global SiC Power Modules for AI Data Center Power market?

What factors are driving SiC Power Modules for AI Data Center Power market growth, globally and by region?

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

How do SiC Power Modules for AI Data Center Power market opportunities vary by end market size?

How does SiC Power Modules for AI Data Center Power break out by Type, by Application?

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