

# Global VSC-HVDC Converter Valve Market Growth 2026-2032

<https://marketpublishers.com/r/G69311FA6F15EN.html>

Date: October 2026

Pages: 123

Price: US\$ 3,660.00 (Single User License)

ID: G69311FA6F15EN

## Abstracts

The global VSC-HVDC Converter Valve market size is predicted to grow from US\$ 1832 million in 2025 to US\$ 6979 million in 2032; it is expected to grow at a CAGR of 20.3% from 2026 to 2032.

The Flexible DC Converter Valve (VSC-HVDC Converter Valve) is the core power conversion equipment in flexible DC transmission systems. It primarily utilizes fully controlled power semiconductor devices such as IGBTs and IGCTs to achieve bidirectional conversion between AC and DC through topologies such as modular multilevel converters (MMCs), enabling rapid and independent regulation of active and reactive power.

Compared to traditional thyristor-based LCC-HVDC converter valves, the VSC-HVDC converter valve does not rely on the AC system to provide commutation voltage. It offers advantages such as zero commutation failures, the ability to connect to weak or passive grids, support for black start, rapid power flow reversal, low harmonic levels, and ease of constructing multi-terminal DC grids. Currently, MMC has become the mainstream technical approach for high-voltage, high-capacity flexible DC systems. Hitachi Energy's HVDC Light, Siemens Energy's HVDC PLUS, and GE Vernova's VSC-HVDC all utilize or incorporate VSC/MMC technology.

In 2025, global sales of VSC-HVDC Converter Valve reached 28,263 MW, with an average price of \$66.25/kW.

## Development Trends

Upgrades from  $\pm 320/500$  kV to  $\pm 525/640$  kV and  $\pm 800$  kV

European offshore wind power has evolved from 900 MW-class platforms to 2 GW-class 525 kV platforms; Hitachi Energy's current HVDC Light technology capabilities now cover up to approximately 3,000 MW at the  $\pm 640$  kV level.

China's development path is more focused on the transmission of ultra-high-capacity onshore renewable energy. The Gansu-Zhejiang project has brought  $\pm 800$  kV, 8 GW-class VSC-HVDC into commercial operation, enabling flexible DC transmission to enter the ultra-long-distance, high-capacity transmission sector—an area previously dominated by LCC.

### MMC Has Become the Absolute Mainstream

Traditional two-level and three-level VSCs are gradually being phased out of new large-scale projects in the high-voltage transmission sector. MMC has emerged as the core architecture due to its advantages, including modularity, good voltage scalability, low harmonics, lower device switching frequencies, and ease of redundancy design.

Siemens' HVDC PLUS explicitly adopts MMC; Mitsubishi's HVDC-Diamond also employs the MMC architecture, covering capacities ranging from 50 MW to over 1,000 MW.

### IGBTs Remain Dominant, but IGCT Market Share Will Increase Significantly

Currently, high-voltage butt-jointed IGBTs still dominate the global commercial HVDC market. However, China is actively promoting the development of high-voltage, high-current IGCTs.

Xidian, Xuji, NARI Protection, TBEA, and Rongxin Huike have all launched products related to IGCT converter valves. IGCTs can reduce the number of devices in series by utilizing higher single-device capacity, and are expected to decrease valve size, losses, and costs.

### Offshore Wind Power Becomes Europe's Largest Source of Demand

For deep-sea wind farms located 100–300 km or more from the coast, AC transmission is constrained by reactive power and cable charging currents, making HVDC significantly more economical.

In the future, the European North Sea will become the world's largest  $\pm 525$  kV, 2 GW-class VSC-HVDC converter valve market\*\*. TenneT's 2 GW standardization plan has already prompted a shift in FHDC converter equipment from "project-specific customization" to "platform-based bulk procurement."

### China's Growth Focus Shifts from Demonstration Projects to Large-Scale UHV FHDC

In the past, FHDC in China was primarily used in demonstration or regional projects such as Zhoushan, Xiamen, Zhangbei, Kunliulong, and offshore wind power. Now, with the advancement of projects such as Gansu-Zhejiang, Tibet-Guangdong, and Western Inner Mongolia–Beijing-Tianjin-Hebei, VSC-HVDC is entering the main inter-regional power transmission grid.

The list of major technological equipment published by the National Energy Administration now includes  $\pm 800$  kV VSC-HVDC converter valves, next-generation high-voltage/high-current IGBT converter valves, and IGCT converter valves.

### Report Scope

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for VSC-HVDC Converter Valve 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 VSC-HVDC Converter Valve.

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

## Market Segmentation

### **Segmentation by Type:**

IGBT-based VSC-HVDC Converter Valve

IGCT-based VSC-HVDC Converter Valve

Other VSC-HVDC Converter Valve

### **Segmentation by DC Voltage Rating:**

Up to  $\pm 200$  kV

Above  $\pm 200$  kV to  $\pm 350$  kV

Above  $\pm 350$  kV to  $\pm 525$  kV

Above  $\pm 525$  kV

### **Segmentation by Valve Structural Configuration:**

Valve Tower Type

Containerized Type

Other Structural Types

## **Segmentation by Application:**

Offshore Wind Power Transmission

Long-distance Renewable Energy Transmission

Grid Interconnection

Back-to-Back Grid Connection

Urban Power Supply

Multi-terminal DC Grid

Other

## **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.

Hitachi Energy

Siemens Energy

GE Vernova

NR Electric Co., Ltd.

XJ Group Corporation

Rongxin Huike Electric Co., Ltd.

China XD Electric Co., Ltd.

TBEA Co., Ltd.

Beijing Sifang Automation Co., Ltd.

Sieyuan Electric Co., Ltd.

Toshiba Energy Systems & Solutions Corporation

Mitsubishi Electric Corporation

LS ELECTRIC Co., Ltd.

Hyosung Heavy Industries Corporation

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

What is the 10-year outlook for the global VSC-HVDC Converter Valve market?

What factors are driving VSC-HVDC Converter Valve market growth, globally and by region?

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

How do VSC-HVDC Converter Valve market opportunities vary by end market size?

How does VSC-HVDC Converter Valve break out by Type, by Application?



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