

Global VSC-HVDC DC-Link Capacitors Market Growth 2026-2032

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Abstracts

The global VSC-HVDC DC-Link Capacitors market size is predicted to grow from US\$ 697 million in 2025 to US\$ 1632 million in 2032; it is expected to grow at a CAGR of 13.1% from 2026 to 2032.

Flexible DC support capacitors are high-capacity DC film capacitors installed in the submodules of VSC-HVDC and MMC-HVDC flexible DC converter valves. They typically form part of a power submodule together with IGBTs, IGCTs, or other fully controlled power semiconductors, bypass switches, stacked busbars, and valve control units.

Their primary functions include:

Stabilizing the DC-side voltage of the submodule;

Storing and releasing transient energy;

Absorbing power fluctuations and ripple currents in the bridge arms;

Reducing DC voltage fluctuations;

Supporting converter fault ride-through and dynamic power regulation;

Suppressing spikes and high-frequency oscillations caused by device switching.

The scope of application of NB/T 11388-2023 explicitly covers DC capacitors installed within the power module subunits of converter valves in flexible high-voltage DC

transmission systems rated at ± 800 kV and below. Typical parameters for Chinese FHVDC products include a rated voltage of 1.0–4.0 kV, a rated capacitance of 2,000–20,000 μF , an equivalent series inductance (ESL) not exceeding 50 nH, and a design life of up to 40 years.

In 2025, global sales of VSC-HVDC DC-Link Capacitors reached 65.77 thousand units, with an average price of 10.83 thousand U.S. dollars per unit.

Industry Development Trends

Ultra-High-Voltage Flexible DC Drives Up Demand for Individual Projects

Flexible DC systems are gradually evolving from ± 320 kV and ± 500 kV to ± 525 kV and ± 800 kV. The transmission capacity of individual projects has increased from 1–2 GW to 4–8 GW. Although higher-voltage power devices can reduce the number of submodules, the voltage, capacitance, and reliability requirements for individual capacitors have significantly increased.

Offshore Wind Power Becomes Europe's Largest Growth Market

Offshore wind projects are located far from land, and AC transmission faces challenges related to reactive power compensation and cable charging currents; VSC-HVDC is typically the preferred solution for large-scale offshore wind projects. Offshore FDC projects currently under construction or in the planning stages in Europe will continue to drive demand for highly reliable, moisture- and heat-resistant, low-maintenance capacitors. Several of Siemens Energy's offshore and cross-border interconnection projects have already adopted HVDC PLUS technology with an MMC structure.

Capacitors Are Evolving Toward Higher Voltage, Larger Capacitance, and Lower Inductance

Mainstream products are shifting from 2.0–2.8 kV to 3.0–4.0 kV, with capacitance expanding from 4,000–6,000 μF to 8,000–12,000 μF , while simultaneously requiring ESL values below 30–50 nH and further reductions in ESR. Manufacturers such as TDK have already launched low-inductance DC-link products designed for high-frequency SiC power electronic systems, with rated voltages reaching 2 kV, reflecting the trend toward higher frequencies and lower inductance.

6.5 kV IGBTs, IGCTs, and SiC Transform Product Architecture

IGBTs or IGCTs operating at higher voltage levels can reduce the number of converter valve submodules and lower control complexity, but they increase the voltage and energy density of individual submodules. The market may experience a structural shift in the future characterized by “sales growth lagging behind the growth in HVDC capacity, while the value per unit increases.” China Southern Power Grid has announced a technological breakthrough in 6.5 kV/3 kA IGBT HVDC converter valve technology.

Dry-type metallized polypropylene film becomes the mainstream choice

HVDC support capacitors require self-healing, non-polarity, low loss, and high ripple current resistance; dry-type metallized polypropylene film has already captured approximately 85% of the market. Liquid-impregnated products are still used in some high-voltage, high-energy-density, or special-environment projects.

Online Condition Monitoring Is Gradually Becoming Standard Equipment

Due to the large number of capacitors in MMCs, capacity degradation or rising ESR in a single capacitor can affect the voltage balance of the submodule. Future products will increasingly integrate monitoring of temperature, pressure, and electrical parameters, and will assess capacity and remaining life through the converter valve control system. Relevant standards from the Chinese Society for Electrical Engineering have already included the condition evaluation of submodule DC support capacitors as a core component.

Domestic Substitution in China Enters the Stage of Engineering-Scale Mass Production

In China's early HVDC projects, high-end support capacitors were primarily supplied by European and Japanese companies. In recent years, companies such as XD Electric Capacitor, Guilin Capacitor, Faratron, Saijing, and Chenrui have successively completed product certification and engineering validation, marking the transition of domestic production from the prototype stage to mass production.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “VSC-HVDC DC-Link Capacitors Industry Forecast” looks at past sales and reviews total world VSC-HVDC DC-Link Capacitors sales in 2025, providing a comprehensive analysis by region and

market sector of projected VSC-HVDC DC-Link Capacitors sales for 2026 through 2032. With VSC-HVDC DC-Link Capacitors sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world VSC-HVDC DC-Link Capacitors industry.

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

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

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

Segmentation by Type:

Dry-Type Metallized Polypropylene Film Capacitors

Oil-Impregnated Polypropylene Film Capacitors

Segmentation by Rated Voltage:

Below 2 kV

2–3 kV

3–4 kV

Above 4 kV

Segmentation by Rated Capacitance:

Below 4,000 ?F

4,000–8,000 ?F

8,000–12,000 ?F

Above 12,000 ?F

Segmentation by Application:

Point-to-Point VSC-HVDC Transmission

Offshore Wind HVDC Export

Multi-Terminal HVDC Grids

Back-to-Back HVDC Interconnection

Urban Power Grid DC Infeed

Medium-Voltage DC Distribution

Flexible Low-Frequency Transmission

Renewable Energy Base HVDC Transmission

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 Ltd.

ELECTRONICON Kondensatoren GmbH

GE Vernova Inc.

TDK Corporation

Vishay Intertechnology, Inc.

YAGEO Corporation (KEMET)

WIMA GmbH & Co. KG

Mersen S.A.

Cornell Dubilier Electronics, Inc.

Ducati Energia S.p.A.

Iskra d.o.o.

Nichicon Corporation

Shizuki Electric Company Inc.

Xiamen Faratronic Co., Ltd.

Sun.King Technology Group Limited

Wuxi CRE New Energy Technology Co., Ltd.

Anhui Tongfeng Electronics Co., Ltd.

Nantong Jianghai Capacitor Co., Ltd.

Guilin Power Capacitor Co., Ltd.

Xi'an XD Power Capacitor Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global VSC-HVDC DC-Link Capacitors market?

What factors are driving VSC-HVDC DC-Link Capacitors market growth, globally and by region?

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

How do VSC-HVDC DC-Link Capacitors market opportunities vary by end market size?

How does VSC-HVDC DC-Link Capacitors break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global VSC-HVDC DC-Link Capacitors Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for VSC-HVDC DC-Link Capacitors by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for VSC-HVDC DC-Link Capacitors by Country/Region, 2021, 2025 & 2032
- 2.2 VSC-HVDC DC-Link Capacitors Segment by Type
 - 2.2.1 Dry-Type Metallized Polypropylene Film Capacitors
 - 2.2.2 Oil-Impregnated Polypropylene Film Capacitors
 - 2.2.3 VSC-HVDC DC-Link Capacitors Sales by Type
 - 2.2.3.1 Global VSC-HVDC DC-Link Capacitors Sales Market Share by Type (2021-2026)
 - 2.2.3.2 Global VSC-HVDC DC-Link Capacitors Revenue and Market Share by Type (2021-2026)
 - 2.2.3.3 Global VSC-HVDC DC-Link Capacitors Sale Price by Type (2021-2026)
- 2.3 VSC-HVDC DC-Link Capacitors Segment by Rated Voltage
 - 2.3.1 Below 2 kV
 - 2.3.2 2–3 kV
 - 2.3.3 3–4 kV
 - 2.3.4 Above 4 kV
 - 2.3.5 VSC-HVDC DC-Link Capacitors Sales by Rated Voltage
 - 2.3.5.1 Global VSC-HVDC DC-Link Capacitors Sales Market Share by Rated Voltage (2021-2026)
 - 2.3.5.2 Global VSC-HVDC DC-Link Capacitors Revenue and Market Share by Rated

Voltage (2021-2026)

2.3.5.3 Global VSC-HVDC DC-Link Capacitors Sale Price by Rated Voltage (2021-2026)

2.4 VSC-HVDC DC-Link Capacitors Segment by Rated Capacitance

2.4.1 Below 4,000 ?F

2.4.2 4,000–8,000 ?F

2.4.3 8,000–12,000 ?F

2.4.4 Above 12,000 ?F

2.4.5 VSC-HVDC DC-Link Capacitors Sales by Rated Capacitance

2.4.5.1 Global VSC-HVDC DC-Link Capacitors Sales Market Share by Rated Capacitance (2021-2026)

2.4.5.2 Global VSC-HVDC DC-Link Capacitors Revenue and Market Share by Rated Capacitance (2021-2026)

2.4.5.3 Global VSC-HVDC DC-Link Capacitors Sale Price by Rated Capacitance (2021-2026)

2.5 VSC-HVDC DC-Link Capacitors Segment by Application

2.5.1 Point-to-Point VSC-HVDC Transmission

2.5.2 Offshore Wind HVDC Export

2.5.3 Multi-Terminal HVDC Grids

2.5.4 Back-to-Back HVDC Interconnection

2.5.5 Urban Power Grid DC Infeed

2.5.6 Medium-Voltage DC Distribution

2.5.7 Flexible Low-Frequency Transmission

2.5.8 Renewable Energy Base HVDC Transmission

2.5.9 VSC-HVDC DC-Link Capacitors Sales by Application

2.5.9.1 Global VSC-HVDC DC-Link Capacitors Sale Market Share by Application (2021-2026)

2.5.9.2 Global VSC-HVDC DC-Link Capacitors Revenue and Market Share by Application (2021-2026)

2.5.9.3 Global VSC-HVDC DC-Link Capacitors Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global VSC-HVDC DC-Link Capacitors Breakdown Data by Company

3.1.1 Global VSC-HVDC DC-Link Capacitors Annual Sales by Company (2021-2026)

3.1.2 Global VSC-HVDC DC-Link Capacitors Sales Market Share by Company (2021-2026)

3.2 Global VSC-HVDC DC-Link Capacitors Annual Revenue by Company (2021-2026)

3.2.1 Global VSC-HVDC DC-Link Capacitors Revenue by Company (2021-2026)

3.2.2 Global VSC-HVDC DC-Link Capacitors Revenue Market Share by Company (2021-2026)

3.3 Global VSC-HVDC DC-Link Capacitors Sale Price by Company

3.4 Key Manufacturers VSC-HVDC DC-Link Capacitors Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers VSC-HVDC DC-Link Capacitors Product Location Distribution

3.4.2 Players VSC-HVDC DC-Link Capacitors Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR VSC-HVDC DC-LINK CAPACITORS BY GEOGRAPHIC REGION

4.1 World Historic VSC-HVDC DC-Link Capacitors Market Size by Geographic Region (2021-2026)

4.1.1 Global VSC-HVDC DC-Link Capacitors Annual Sales by Geographic Region (2021-2026)

4.1.2 Global VSC-HVDC DC-Link Capacitors Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic VSC-HVDC DC-Link Capacitors Market Size by Country/Region (2021-2026)

4.2.1 Global VSC-HVDC DC-Link Capacitors Annual Sales by Country/Region (2021-2026)

4.2.2 Global VSC-HVDC DC-Link Capacitors Annual Revenue by Country/Region (2021-2026)

4.3 Americas VSC-HVDC DC-Link Capacitors Sales Growth

4.4 APAC VSC-HVDC DC-Link Capacitors Sales Growth

4.5 Europe VSC-HVDC DC-Link Capacitors Sales Growth

4.6 Middle East & Africa VSC-HVDC DC-Link Capacitors Sales Growth

5 AMERICAS

5.1 Americas VSC-HVDC DC-Link Capacitors Sales by Country

5.1.1 Americas VSC-HVDC DC-Link Capacitors Sales by Country (2021-2026)

5.1.2 Americas VSC-HVDC DC-Link Capacitors Revenue by Country (2021-2026)

5.2 Americas VSC-HVDC DC-Link Capacitors Sales by Type (2021-2026)

5.3 Americas VSC-HVDC DC-Link Capacitors Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC VSC-HVDC DC-Link Capacitors Sales by Region

6.1.1 APAC VSC-HVDC DC-Link Capacitors Sales by Region (2021-2026)

6.1.2 APAC VSC-HVDC DC-Link Capacitors Revenue by Region (2021-2026)

6.2 APAC VSC-HVDC DC-Link Capacitors Sales by Type (2021-2026)

6.3 APAC VSC-HVDC DC-Link Capacitors Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe VSC-HVDC DC-Link Capacitors by Country

7.1.1 Europe VSC-HVDC DC-Link Capacitors Sales by Country (2021-2026)

7.1.2 Europe VSC-HVDC DC-Link Capacitors Revenue by Country (2021-2026)

7.2 Europe VSC-HVDC DC-Link Capacitors Sales by Type (2021-2026)

7.3 Europe VSC-HVDC DC-Link Capacitors Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa VSC-HVDC DC-Link Capacitors by Country

8.1.1 Middle East & Africa VSC-HVDC DC-Link Capacitors Sales by Country (2021-2026)

8.1.2 Middle East & Africa VSC-HVDC DC-Link Capacitors Revenue by Country (2021-2026)

8.2 Middle East & Africa VSC-HVDC DC-Link Capacitors Sales by Type (2021-2026)

8.3 Middle East & Africa VSC-HVDC DC-Link Capacitors Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of VSC-HVDC DC-Link Capacitors

10.3 Manufacturing Process Analysis of VSC-HVDC DC-Link Capacitors

10.4 Industry Chain Structure of VSC-HVDC DC-Link Capacitors

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 VSC-HVDC DC-Link Capacitors Distributors

11.3 VSC-HVDC DC-Link Capacitors Customer

12 WORLD FORECAST REVIEW FOR VSC-HVDC DC-LINK CAPACITORS BY GEOGRAPHIC REGION

12.1 Global VSC-HVDC DC-Link Capacitors Market Size Forecast by Region

12.1.1 Global VSC-HVDC DC-Link Capacitors Forecast by Region (2027-2032)

12.1.2 Global VSC-HVDC DC-Link Capacitors Annual Revenue Forecast by Region (2027-2032)

- 12.2 Americas Forecast by Country (2027-2032)
- 12.3 APAC Forecast by Region (2027-2032)
- 12.4 Europe Forecast by Country (2027-2032)
- 12.5 Middle East & Africa Forecast by Country (2027-2032)
- 12.6 Global VSC-HVDC DC-Link Capacitors Forecast by Type (2027-2032)
- 12.7 Global VSC-HVDC DC-Link Capacitors Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Hitachi Energy Ltd.

- 13.1.1 Hitachi Energy Ltd. Company Information
- 13.1.2 Hitachi Energy Ltd. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications
- 13.1.3 Hitachi Energy Ltd. VSC-HVDC DC-Link Capacitors Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.1.4 Hitachi Energy Ltd. Main Business Overview
- 13.1.5 Hitachi Energy Ltd. Latest Developments

13.2 ELECTRONICON Kondensatoren GmbH

- 13.2.1 ELECTRONICON Kondensatoren GmbH Company Information
- 13.2.2 ELECTRONICON Kondensatoren GmbH VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications
- 13.2.3 ELECTRONICON Kondensatoren GmbH VSC-HVDC DC-Link Capacitors Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.2.4 ELECTRONICON Kondensatoren GmbH Main Business Overview
- 13.2.5 ELECTRONICON Kondensatoren GmbH Latest Developments

13.3 GE Vernova Inc.

- 13.3.1 GE Vernova Inc. Company Information
- 13.3.2 GE Vernova Inc. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications
- 13.3.3 GE Vernova Inc. VSC-HVDC DC-Link Capacitors Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.3.4 GE Vernova Inc. Main Business Overview
- 13.3.5 GE Vernova Inc. Latest Developments

13.4 TDK Corporation

- 13.4.1 TDK Corporation Company Information
- 13.4.2 TDK Corporation VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications
- 13.4.3 TDK Corporation VSC-HVDC DC-Link Capacitors Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.4.4 TDK Corporation Main Business Overview
- 13.4.5 TDK Corporation Latest Developments
- 13.5 Vishay Intertechnology, Inc.
 - 13.5.1 Vishay Intertechnology, Inc. Company Information
 - 13.5.2 Vishay Intertechnology, Inc. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications
 - 13.5.3 Vishay Intertechnology, Inc. VSC-HVDC DC-Link Capacitors Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 Vishay Intertechnology, Inc. Main Business Overview
 - 13.5.5 Vishay Intertechnology, Inc. Latest Developments
- 13.6 YAGEO Corporation (KEMET)
 - 13.6.1 YAGEO Corporation (KEMET) Company Information
 - 13.6.2 YAGEO Corporation (KEMET) VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications
 - 13.6.3 YAGEO Corporation (KEMET) VSC-HVDC DC-Link Capacitors Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 YAGEO Corporation (KEMET) Main Business Overview
 - 13.6.5 YAGEO Corporation (KEMET) Latest Developments
- 13.7 WIMA GmbH & Co. KG
 - 13.7.1 WIMA GmbH & Co. KG Company Information
 - 13.7.2 WIMA GmbH & Co. KG VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications
 - 13.7.3 WIMA GmbH & Co. KG VSC-HVDC DC-Link Capacitors Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 WIMA GmbH & Co. KG Main Business Overview
 - 13.7.5 WIMA GmbH & Co. KG Latest Developments
- 13.8 Mersen S.A.
 - 13.8.1 Mersen S.A. Company Information
 - 13.8.2 Mersen S.A. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications
 - 13.8.3 Mersen S.A. VSC-HVDC DC-Link Capacitors Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 Mersen S.A. Main Business Overview
 - 13.8.5 Mersen S.A. Latest Developments
- 13.9 Cornell Dubilier Electronics, Inc.
 - 13.9.1 Cornell Dubilier Electronics, Inc. Company Information
 - 13.9.2 Cornell Dubilier Electronics, Inc. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications
 - 13.9.3 Cornell Dubilier Electronics, Inc. VSC-HVDC DC-Link Capacitors Sales,

Revenue, Price and Gross Margin (2021-2026)

13.9.4 Cornell Dubilier Electronics, Inc. Main Business Overview

13.9.5 Cornell Dubilier Electronics, Inc. Latest Developments

13.10 Ducati Energia S.p.A.

13.10.1 Ducati Energia S.p.A. Company Information

13.10.2 Ducati Energia S.p.A. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

13.10.3 Ducati Energia S.p.A. VSC-HVDC DC-Link Capacitors Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Ducati Energia S.p.A. Main Business Overview

13.10.5 Ducati Energia S.p.A. Latest Developments

13.11 Iskra d.o.o.

13.11.1 Iskra d.o.o. Company Information

13.11.2 Iskra d.o.o. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

13.11.3 Iskra d.o.o. VSC-HVDC DC-Link Capacitors Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Iskra d.o.o. Main Business Overview

13.11.5 Iskra d.o.o. Latest Developments

13.12 Nichicon Corporation

13.12.1 Nichicon Corporation Company Information

13.12.2 Nichicon Corporation VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

13.12.3 Nichicon Corporation VSC-HVDC DC-Link Capacitors Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 Nichicon Corporation Main Business Overview

13.12.5 Nichicon Corporation Latest Developments

13.13 Shizuki Electric Company Inc.

13.13.1 Shizuki Electric Company Inc. Company Information

13.13.2 Shizuki Electric Company Inc. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

13.13.3 Shizuki Electric Company Inc. VSC-HVDC DC-Link Capacitors Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Shizuki Electric Company Inc. Main Business Overview

13.13.5 Shizuki Electric Company Inc. Latest Developments

13.14 Xiamen Faratronic Co., Ltd.

13.14.1 Xiamen Faratronic Co., Ltd. Company Information

13.14.2 Xiamen Faratronic Co., Ltd. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

13.14.3 Xiamen Faratronic Co., Ltd. VSC-HVDC DC-Link Capacitors Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Xiamen Faratronic Co., Ltd. Main Business Overview

13.14.5 Xiamen Faratronic Co., Ltd. Latest Developments

13.15 Sun.King Technology Group Limited

13.15.1 Sun.King Technology Group Limited Company Information

13.15.2 Sun.King Technology Group Limited VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

13.15.3 Sun.King Technology Group Limited VSC-HVDC DC-Link Capacitors Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Sun.King Technology Group Limited Main Business Overview

13.15.5 Sun.King Technology Group Limited Latest Developments

13.16 Wuxi CRE New Energy Technology Co., Ltd.

13.16.1 Wuxi CRE New Energy Technology Co., Ltd. Company Information

13.16.2 Wuxi CRE New Energy Technology Co., Ltd. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

13.16.3 Wuxi CRE New Energy Technology Co., Ltd. VSC-HVDC DC-Link Capacitors Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 Wuxi CRE New Energy Technology Co., Ltd. Main Business Overview

13.16.5 Wuxi CRE New Energy Technology Co., Ltd. Latest Developments

13.17 Anhui Tongfeng Electronics Co., Ltd.

13.17.1 Anhui Tongfeng Electronics Co., Ltd. Company Information

13.17.2 Anhui Tongfeng Electronics Co., Ltd. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

13.17.3 Anhui Tongfeng Electronics Co., Ltd. VSC-HVDC DC-Link Capacitors Sales, Revenue, Price and Gross Margin (2021-2026)

13.17.4 Anhui Tongfeng Electronics Co., Ltd. Main Business Overview

13.17.5 Anhui Tongfeng Electronics Co., Ltd. Latest Developments

13.18 Nantong Jianghai Capacitor Co., Ltd.

13.18.1 Nantong Jianghai Capacitor Co., Ltd. Company Information

13.18.2 Nantong Jianghai Capacitor Co., Ltd. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

13.18.3 Nantong Jianghai Capacitor Co., Ltd. VSC-HVDC DC-Link Capacitors Sales, Revenue, Price and Gross Margin (2021-2026)

13.18.4 Nantong Jianghai Capacitor Co., Ltd. Main Business Overview

13.18.5 Nantong Jianghai Capacitor Co., Ltd. Latest Developments

13.19 Guilin Power Capacitor Co., Ltd.

13.19.1 Guilin Power Capacitor Co., Ltd. Company Information

13.19.2 Guilin Power Capacitor Co., Ltd. VSC-HVDC DC-Link Capacitors Product

Portfolios and Specifications

13.19.3 Guilin Power Capacitor Co., Ltd. VSC-HVDC DC-Link Capacitors Sales, Revenue, Price and Gross Margin (2021-2026)

13.19.4 Guilin Power Capacitor Co., Ltd. Main Business Overview

13.19.5 Guilin Power Capacitor Co., Ltd. Latest Developments

13.20 Xi'an XD Power Capacitor Co., Ltd.

13.20.1 Xi'an XD Power Capacitor Co., Ltd. Company Information

13.20.2 Xi'an XD Power Capacitor Co., Ltd. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

13.20.3 Xi'an XD Power Capacitor Co., Ltd. VSC-HVDC DC-Link Capacitors Sales, Revenue, Price and Gross Margin (2021-2026)

13.20.4 Xi'an XD Power Capacitor Co., Ltd. Main Business Overview

13.20.5 Xi'an XD Power Capacitor Co., Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. VSC-HVDC DC-Link Capacitors Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. VSC-HVDC DC-Link Capacitors Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Dry-Type Metallized Polypropylene Film Capacitors

Table 4. Major Players of Oil-Impregnated Polypropylene Film Capacitors

Table 5. Global VSC-HVDC DC-Link Capacitors Sales by Type (2021-2026) & (K Units)

Table 6. Global VSC-HVDC DC-Link Capacitors Sales Market Share by Type (2021-2026)

Table 7. Global VSC-HVDC DC-Link Capacitors Revenue by Type (2021-2026) & (\$ million)

Table 8. Global VSC-HVDC DC-Link Capacitors Revenue Market Share by Type (2021-2026)

Table 9. Global VSC-HVDC DC-Link Capacitors Sale Price by Type (2021-2026) & (K US\$/Unit)

Table 10. Major Players of Below 2 kV

Table 11. Major Players of 2–3 kV

Table 12. Major Players of 3–4 kV

Table 13. Major Players of Above 4 kV

Table 14. Global VSC-HVDC DC-Link Capacitors Sales by Rated Voltage (2021-2026) & (K Units)

Table 15. Global VSC-HVDC DC-Link Capacitors Sales Market Share by Rated Voltage (2021-2026)

Table 16. Global VSC-HVDC DC-Link Capacitors Revenue by Rated Voltage (2021-2026) & (\$ million)

Table 17. Global VSC-HVDC DC-Link Capacitors Revenue Market Share by Rated Voltage (2021-2026)

Table 18. Global VSC-HVDC DC-Link Capacitors Sale Price by Rated Voltage (2021-2026) & (K US\$/Unit)

Table 19. Major Players of Below 4,000 ?F

Table 20. Major Players of 4,000–8,000 ?F

Table 21. Major Players of 8,000–12,000 ?F

Table 22. Major Players of Above 12,000 ?F

Table 23. Global VSC-HVDC DC-Link Capacitors Sales by Rated Capacitance (2021-2026) & (K Units)

Table 24. Global VSC-HVDC DC-Link Capacitors Sales Market Share by Rated Capacitance (2021-2026)

Table 25. Global VSC-HVDC DC-Link Capacitors Revenue by Rated Capacitance (2021-2026) & (\$ million)

Table 26. Global VSC-HVDC DC-Link Capacitors Revenue Market Share by Rated Capacitance (2021-2026)

Table 27. Global VSC-HVDC DC-Link Capacitors Sale Price by Rated Capacitance (2021-2026) & (K US\$/Unit)

Table 28. Global VSC-HVDC DC-Link Capacitors Sale by Application (2021-2026) & (K Units)

Table 29. Global VSC-HVDC DC-Link Capacitors Sale Market Share by Application (2021-2026)

Table 30. Global VSC-HVDC DC-Link Capacitors Revenue by Application (2021-2026) & (\$ million)

Table 31. Global VSC-HVDC DC-Link Capacitors Revenue Market Share by Application (2021-2026)

Table 32. Global VSC-HVDC DC-Link Capacitors Sale Price by Application (2021-2026) & (K US\$/Unit)

Table 33. Global VSC-HVDC DC-Link Capacitors Sales by Company (2021-2026) & (K Units)

Table 34. Global VSC-HVDC DC-Link Capacitors Sales Market Share by Company (2021-2026)

Table 35. Global VSC-HVDC DC-Link Capacitors Revenue by Company (2021-2026) & (\$ millions)

Table 36. Global VSC-HVDC DC-Link Capacitors Revenue Market Share by Company (2021-2026)

Table 37. Global VSC-HVDC DC-Link Capacitors Sale Price by Company (2021-2026) & (K US\$/Unit)

Table 38. Key Manufacturers VSC-HVDC DC-Link Capacitors Producing Area Distribution and Sales Area

Table 39. Players VSC-HVDC DC-Link Capacitors Products Offered

Table 40. VSC-HVDC DC-Link Capacitors Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 41. New Products and Potential Entrants

Table 42. Market M&A Activity & Strategy

Table 43. Global VSC-HVDC DC-Link Capacitors Sales by Geographic Region (2021-2026) & (K Units)

Table 44. Global VSC-HVDC DC-Link Capacitors Sales Market Share Geographic Region (2021-2026)

Table 45. Global VSC-HVDC DC-Link Capacitors Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 46. Global VSC-HVDC DC-Link Capacitors Revenue Market Share by Geographic Region (2021-2026)

Table 47. Global VSC-HVDC DC-Link Capacitors Sales by Country/Region (2021-2026) & (K Units)

Table 48. Global VSC-HVDC DC-Link Capacitors Sales Market Share by Country/Region (2021-2026)

Table 49. Global VSC-HVDC DC-Link Capacitors Revenue by Country/Region (2021-2026) & (\$ millions)

Table 50. Global VSC-HVDC DC-Link Capacitors Revenue Market Share by Country/Region (2021-2026)

Table 51. Americas VSC-HVDC DC-Link Capacitors Sales by Country (2021-2026) & (K Units)

Table 52. Americas VSC-HVDC DC-Link Capacitors Sales Market Share by Country (2021-2026)

Table 53. Americas VSC-HVDC DC-Link Capacitors Revenue by Country (2021-2026) & (\$ millions)

Table 54. Americas VSC-HVDC DC-Link Capacitors Sales by Type (2021-2026) & (K Units)

Table 55. Americas VSC-HVDC DC-Link Capacitors Sales by Application (2021-2026) & (K Units)

Table 56. APAC VSC-HVDC DC-Link Capacitors Sales by Region (2021-2026) & (K Units)

Table 57. APAC VSC-HVDC DC-Link Capacitors Sales Market Share by Region (2021-2026)

Table 58. APAC VSC-HVDC DC-Link Capacitors Revenue by Region (2021-2026) & (\$ millions)

Table 59. APAC VSC-HVDC DC-Link Capacitors Sales by Type (2021-2026) & (K Units)

Table 60. APAC VSC-HVDC DC-Link Capacitors Sales by Application (2021-2026) & (K Units)

Table 61. Europe VSC-HVDC DC-Link Capacitors Sales by Country (2021-2026) & (K Units)

Table 62. Europe VSC-HVDC DC-Link Capacitors Revenue by Country (2021-2026) & (\$ millions)

Table 63. Europe VSC-HVDC DC-Link Capacitors Sales by Type (2021-2026) & (K Units)

Table 64. Europe VSC-HVDC DC-Link Capacitors Sales by Application (2021-2026) &

(K Units)

Table 65. Middle East & Africa VSC-HVDC DC-Link Capacitors Sales by Country (2021-2026) & (K Units)

Table 66. Middle East & Africa VSC-HVDC DC-Link Capacitors Revenue Market Share by Country (2021-2026)

Table 67. Middle East & Africa VSC-HVDC DC-Link Capacitors Sales by Type (2021-2026) & (K Units)

Table 68. Middle East & Africa VSC-HVDC DC-Link Capacitors Sales by Application (2021-2026) & (K Units)

Table 69. Key Market Drivers & Growth Opportunities of VSC-HVDC DC-Link Capacitors

Table 70. Key Market Challenges & Risks of VSC-HVDC DC-Link Capacitors

Table 71. Key Industry Trends of VSC-HVDC DC-Link Capacitors

Table 72. VSC-HVDC DC-Link Capacitors Raw Material

Table 73. Key Suppliers of Raw Materials

Table 74. VSC-HVDC DC-Link Capacitors Distributors List

Table 75. VSC-HVDC DC-Link Capacitors Customer List

Table 76. Global VSC-HVDC DC-Link Capacitors Sales Forecast by Region (2027-2032) & (K Units)

Table 77. Global VSC-HVDC DC-Link Capacitors Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 78. Americas VSC-HVDC DC-Link Capacitors Sales Forecast by Country (2027-2032) & (K Units)

Table 79. Americas VSC-HVDC DC-Link Capacitors Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 80. APAC VSC-HVDC DC-Link Capacitors Sales Forecast by Region (2027-2032) & (K Units)

Table 81. APAC VSC-HVDC DC-Link Capacitors Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 82. Europe VSC-HVDC DC-Link Capacitors Sales Forecast by Country (2027-2032) & (K Units)

Table 83. Europe VSC-HVDC DC-Link Capacitors Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 84. Middle East & Africa VSC-HVDC DC-Link Capacitors Sales Forecast by Country (2027-2032) & (K Units)

Table 85. Middle East & Africa VSC-HVDC DC-Link Capacitors Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 86. Global VSC-HVDC DC-Link Capacitors Sales Forecast by Type (2027-2032) & (K Units)

Table 87. Global VSC-HVDC DC-Link Capacitors Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 88. Global VSC-HVDC DC-Link Capacitors Sales Forecast by Application (2027-2032) & (K Units)

Table 89. Global VSC-HVDC DC-Link Capacitors Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 90. Hitachi Energy Ltd. Basic Information, VSC-HVDC DC-Link Capacitors Manufacturing Base, Sales Area and Its Competitors

Table 91. Hitachi Energy Ltd. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

Table 92. Hitachi Energy Ltd. VSC-HVDC DC-Link Capacitors Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 93. Hitachi Energy Ltd. Main Business

Table 94. Hitachi Energy Ltd. Latest Developments

Table 95. ELECTRONICON Kondensatoren GmbH Basic Information, VSC-HVDC DC-Link Capacitors Manufacturing Base, Sales Area and Its Competitors

Table 96. ELECTRONICON Kondensatoren GmbH VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

Table 97. ELECTRONICON Kondensatoren GmbH VSC-HVDC DC-Link Capacitors Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 98. ELECTRONICON Kondensatoren GmbH Main Business

Table 99. ELECTRONICON Kondensatoren GmbH Latest Developments

Table 100. GE Vernova Inc. Basic Information, VSC-HVDC DC-Link Capacitors Manufacturing Base, Sales Area and Its Competitors

Table 101. GE Vernova Inc. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

Table 102. GE Vernova Inc. VSC-HVDC DC-Link Capacitors Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 103. GE Vernova Inc. Main Business

Table 104. GE Vernova Inc. Latest Developments

Table 105. TDK Corporation Basic Information, VSC-HVDC DC-Link Capacitors Manufacturing Base, Sales Area and Its Competitors

Table 106. TDK Corporation VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

Table 107. TDK Corporation VSC-HVDC DC-Link Capacitors Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 108. TDK Corporation Main Business

Table 109. TDK Corporation Latest Developments

Table 110. Vishay Intertechnology, Inc. Basic Information, VSC-HVDC DC-Link

Capacitors Manufacturing Base, Sales Area and Its Competitors

Table 111. Vishay Intertechnology, Inc. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

Table 112. Vishay Intertechnology, Inc. VSC-HVDC DC-Link Capacitors Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 113. Vishay Intertechnology, Inc. Main Business

Table 114. Vishay Intertechnology, Inc. Latest Developments

Table 115. YAGEO Corporation (KEMET) Basic Information, VSC-HVDC DC-Link Capacitors Manufacturing Base, Sales Area and Its Competitors

Table 116. YAGEO Corporation (KEMET) VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

Table 117. YAGEO Corporation (KEMET) VSC-HVDC DC-Link Capacitors Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 118. YAGEO Corporation (KEMET) Main Business

Table 119. YAGEO Corporation (KEMET) Latest Developments

Table 120. WIMA GmbH & Co. KG Basic Information, VSC-HVDC DC-Link Capacitors Manufacturing Base, Sales Area and Its Competitors

Table 121. WIMA GmbH & Co. KG VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

Table 122. WIMA GmbH & Co. KG VSC-HVDC DC-Link Capacitors Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 123. WIMA GmbH & Co. KG Main Business

Table 124. WIMA GmbH & Co. KG Latest Developments

Table 125. Mersen S.A. Basic Information, VSC-HVDC DC-Link Capacitors Manufacturing Base, Sales Area and Its Competitors

Table 126. Mersen S.A. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

Table 127. Mersen S.A. VSC-HVDC DC-Link Capacitors Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 128. Mersen S.A. Main Business

Table 129. Mersen S.A. Latest Developments

Table 130. Cornell Dubilier Electronics, Inc. Basic Information, VSC-HVDC DC-Link Capacitors Manufacturing Base, Sales Area and Its Competitors

Table 131. Cornell Dubilier Electronics, Inc. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

Table 132. Cornell Dubilier Electronics, Inc. VSC-HVDC DC-Link Capacitors Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 133. Cornell Dubilier Electronics, Inc. Main Business

Table 134. Cornell Dubilier Electronics, Inc. Latest Developments

Table 135. Ducati Energia S.p.A. Basic Information, VSC-HVDC DC-Link Capacitors Manufacturing Base, Sales Area and Its Competitors

Table 136. Ducati Energia S.p.A. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

Table 137. Ducati Energia S.p.A. VSC-HVDC DC-Link Capacitors Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 138. Ducati Energia S.p.A. Main Business

Table 139. Ducati Energia S.p.A. Latest Developments

Table 140. Iskra d.o.o. Basic Information, VSC-HVDC DC-Link Capacitors Manufacturing Base, Sales Area and Its Competitors

Table 141. Iskra d.o.o. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

Table 142. Iskra d.o.o. VSC-HVDC DC-Link Capacitors Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 143. Iskra d.o.o. Main Business

Table 144. Iskra d.o.o. Latest Developments

Table 145. Nichicon Corporation Basic Information, VSC-HVDC DC-Link Capacitors Manufacturing Base, Sales Area and Its Competitors

Table 146. Nichicon Corporation VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

Table 147. Nichicon Corporation VSC-HVDC DC-Link Capacitors Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 148. Nichicon Corporation Main Business

Table 149. Nichicon Corporation Latest Developments

Table 150. Shizuki Electric Company Inc. Basic Information, VSC-HVDC DC-Link Capacitors Manufacturing Base, Sales Area and Its Competitors

Table 151. Shizuki Electric Company Inc. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

Table 152. Shizuki Electric Company Inc. VSC-HVDC DC-Link Capacitors Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 153. Shizuki Electric Company Inc. Main Business

Table 154. Shizuki Electric Company Inc. Latest Developments

Table 155. Xiamen Faratronic Co., Ltd. Basic Information, VSC-HVDC DC-Link Capacitors Manufacturing Base, Sales Area and Its Competitors

Table 156. Xiamen Faratronic Co., Ltd. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

Table 157. Xiamen Faratronic Co., Ltd. VSC-HVDC DC-Link Capacitors Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 158. Xiamen Faratronic Co., Ltd. Main Business

Table 159. Xiamen Faratronic Co., Ltd. Latest Developments
Table 160. Sun.King Technology Group Limited Basic Information, VSC-HVDC DC-Link Capacitors Manufacturing Base, Sales Area and Its Competitors
Table 161. Sun.King Technology Group Limited VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications
Table 162. Sun.King Technology Group Limited VSC-HVDC DC-Link Capacitors Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)
Table 163. Sun.King Technology Group Limited Main Business
Table 164. Sun.King Technology Group Limited Latest Developments
Table 165. Wuxi CRE New Energy Technology Co., Ltd. Basic Information, VSC-HVDC DC-Link Capacitors Manufacturing Base, Sales Area and Its Competitors
Table 166. Wuxi CRE New Energy Technology Co., Ltd. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications
Table 167. Wuxi CRE New Energy Technology Co., Ltd. VSC-HVDC DC-Link Capacitors Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)
Table 168. Wuxi CRE New Energy Technology Co., Ltd. Main Business
Table 169. Wuxi CRE New Energy Technology Co., Ltd. Latest Developments
Table 170. Anhui Tongfeng Electronics Co., Ltd. Basic Information, VSC-HVDC DC-Link Capacitors Manufacturing Base, Sales Area and Its Competitors
Table 171. Anhui Tongfeng Electronics Co., Ltd. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications
Table 172. Anhui Tongfeng Electronics Co., Ltd. VSC-HVDC DC-Link Capacitors Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)
Table 173. Anhui Tongfeng Electronics Co., Ltd. Main Business
Table 174. Anhui Tongfeng Electronics Co., Ltd. Latest Developments
Table 175. Nantong Jianghai Capacitor Co., Ltd. Basic Information, VSC-HVDC DC-Link Capacitors Manufacturing Base, Sales Area and Its Competitors
Table 176. Nantong Jianghai Capacitor Co., Ltd. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications
Table 177. Nantong Jianghai Capacitor Co., Ltd. VSC-HVDC DC-Link Capacitors Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)
Table 178. Nantong Jianghai Capacitor Co., Ltd. Main Business
Table 179. Nantong Jianghai Capacitor Co., Ltd. Latest Developments
Table 180. Guilin Power Capacitor Co., Ltd. Basic Information, VSC-HVDC DC-Link Capacitors Manufacturing Base, Sales Area and Its Competitors
Table 181. Guilin Power Capacitor Co., Ltd. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications
Table 182. Guilin Power Capacitor Co., Ltd. VSC-HVDC DC-Link Capacitors Sales (K

Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 183. Guilin Power Capacitor Co., Ltd. Main Business

Table 184. Guilin Power Capacitor Co., Ltd. Latest Developments

Table 185. Xi'an XD Power Capacitor Co., Ltd. Basic Information, VSC-HVDC DC-Link Capacitors Manufacturing Base, Sales Area and Its Competitors

Table 186. Xi'an XD Power Capacitor Co., Ltd. VSC-HVDC DC-Link Capacitors Product Portfolios and Specifications

Table 187. Xi'an XD Power Capacitor Co., Ltd. VSC-HVDC DC-Link Capacitors Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 188. Xi'an XD Power Capacitor Co., Ltd. Main Business

Table 189. Xi'an XD Power Capacitor Co., Ltd. Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Picture of VSC-HVDC DC-Link Capacitors

Figure 2. VSC-HVDC DC-Link Capacitors Report Years Considered

Figure 3. Research Objectives

Figure 4. Research Methodology

Figure 5. Research Process and Data Source

Figure 6. Global VSC-HVDC DC-Link Capacitors Sales Growth Rate 2021-2032 (K Units)

Figure 7. Global VSC-HVDC DC-Link Capacitors Revenue Growth Rate 2021-2032 (\$ millions)

Figure 8. VSC-HVDC DC-Link Capacitors Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 9. VSC-HVDC DC-Link Capacitors Sales Market Share by Country/Region (2025)

Figure 10. VSC-HVDC DC-Link Capacitors Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 11. Product Picture of Dry-Type Metallized Polypropylene Film Capacitors

Figure 12. Product Picture of Oil-Impregnated Polypropylene Film Capacitors

Figure 13. Global VSC-HVDC DC-Link Capacitors Sales Market Share by Type in 2026

Figure 14. Global VSC-HVDC DC-Link Capacitors Revenue Market Share by Type (2021-2026)

Figure 15. Product Picture of Below 2 kV

Figure 16. Product Picture of 2–3 kV

Figure 17. Product Picture of 3–4 kV

Figure 18. Product Picture of Above 4 kV

Figure 19. Global VSC-HVDC DC-Link Capacitors Sales Market Share by Rated Voltage in 2026

Figure 20. Global VSC-HVDC DC-Link Capacitors Revenue Market Share by Rated Voltage (2021-2026)

Figure 21. Product Picture of Below 4,000 ?F

Figure 22. Product Picture of 4,000–8,000 ?F

Figure 23. Product Picture of 8,000–12,000 ?F

Figure 24. Product Picture of Above 12,000 ?F

Figure 25. Global VSC-HVDC DC-Link Capacitors Sales Market Share by Rated Capacitance in 2026

Figure 26. Global VSC-HVDC DC-Link Capacitors Revenue Market Share by Rated

Capacitance (2021-2026)

Figure 27. VSC-HVDC DC-Link Capacitors Consumed in Point-to-Point VSC-HVDC Transmission

Figure 28. Global VSC-HVDC DC-Link Capacitors Market: Point-to-Point VSC-HVDC Transmission (2021-2026) & (K Units)

Figure 29. VSC-HVDC DC-Link Capacitors Consumed in Offshore Wind HVDC Export

Figure 30. Global VSC-HVDC DC-Link Capacitors Market: Offshore Wind HVDC Export (2021-2026) & (K Units)

Figure 31. VSC-HVDC DC-Link Capacitors Consumed in Multi-Terminal HVDC Grids

Figure 32. Global VSC-HVDC DC-Link Capacitors Market: Multi-Terminal HVDC Grids (2021-2026) & (K Units)

Figure 33. VSC-HVDC DC-Link Capacitors Consumed in Back-to-Back HVDC Interconnection

Figure 34. Global VSC-HVDC DC-Link Capacitors Market: Back-to-Back HVDC Interconnection (2021-2026) & (K Units)

Figure 35. VSC-HVDC DC-Link Capacitors Consumed in Urban Power Grid DC Infeed

Figure 36. Global VSC-HVDC DC-Link Capacitors Market: Urban Power Grid DC Infeed (2021-2026) & (K Units)

Figure 37. VSC-HVDC DC-Link Capacitors Consumed in Medium-Voltage DC Distribution

Figure 38. Global VSC-HVDC DC-Link Capacitors Market: Medium-Voltage DC Distribution (2021-2026) & (K Units)

Figure 39. VSC-HVDC DC-Link Capacitors Consumed in Flexible Low-Frequency Transmission

Figure 40. Global VSC-HVDC DC-Link Capacitors Market: Flexible Low-Frequency Transmission (2021-2026) & (K Units)

Figure 41. VSC-HVDC DC-Link Capacitors Consumed in Renewable Energy Base HVDC Transmission

Figure 42. Global VSC-HVDC DC-Link Capacitors Market: Renewable Energy Base HVDC Transmission (2021-2026) & (K Units)

Figure 43. Global VSC-HVDC DC-Link Capacitors Sale Market Share by Application (2025)

Figure 44. Global VSC-HVDC DC-Link Capacitors Revenue Market Share by Application in 2025

Figure 45. VSC-HVDC DC-Link Capacitors Sales by Company in 2025 (K Units)

Figure 46. Global VSC-HVDC DC-Link Capacitors Sales Market Share by Company in 2025

Figure 47. VSC-HVDC DC-Link Capacitors Revenue by Company in 2025 (\$ millions)

Figure 48. Global VSC-HVDC DC-Link Capacitors Revenue Market Share by Company

in 2025

Figure 49. Global VSC-HVDC DC-Link Capacitors Sales Market Share by Geographic Region (2021-2026)

Figure 50. Global VSC-HVDC DC-Link Capacitors Revenue Market Share by Geographic Region in 2025

Figure 51. Americas VSC-HVDC DC-Link Capacitors Sales 2021-2026 (K Units)

Figure 52. Americas VSC-HVDC DC-Link Capacitors Revenue 2021-2026 (\$ millions)

Figure 53. APAC VSC-HVDC DC-Link Capacitors Sales 2021-2026 (K Units)

Figure 54. APAC VSC-HVDC DC-Link Capacitors Revenue 2021-2026 (\$ millions)

Figure 55. Europe VSC-HVDC DC-Link Capacitors Sales 2021-2026 (K Units)

Figure 56. Europe VSC-HVDC DC-Link Capacitors Revenue 2021-2026 (\$ millions)

Figure 57. Middle East & Africa VSC-HVDC DC-Link Capacitors Sales 2021-2026 (K Units)

Figure 58. Middle East & Africa VSC-HVDC DC-Link Capacitors Revenue 2021-2026 (\$ millions)

Figure 59. Americas VSC-HVDC DC-Link Capacitors Sales Market Share by Country in 2025

Figure 60. Americas VSC-HVDC DC-Link Capacitors Revenue Market Share by Country (2021-2026)

Figure 61. Americas VSC-HVDC DC-Link Capacitors Sales Market Share by Type (2021-2026)

Figure 62. Americas VSC-HVDC DC-Link Capacitors Sales Market Share by Application (2021-2026)

Figure 63. United States VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 64. Canada VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 65. Mexico VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 66. Brazil VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 67. APAC VSC-HVDC DC-Link Capacitors Sales Market Share by Region in 2025

Figure 68. APAC VSC-HVDC DC-Link Capacitors Revenue Market Share by Region (2021-2026)

Figure 69. APAC VSC-HVDC DC-Link Capacitors Sales Market Share by Type (2021-2026)

Figure 70. APAC VSC-HVDC DC-Link Capacitors Sales Market Share by Application (2021-2026)

Figure 71. China VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 72. Japan VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 73. South Korea VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 74. Southeast Asia VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 75. India VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 76. Australia VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 77. China Taiwan VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 78. Europe VSC-HVDC DC-Link Capacitors Sales Market Share by Country in 2025

Figure 79. Europe VSC-HVDC DC-Link Capacitors Revenue Market Share by Country (2021-2026)

Figure 80. Europe VSC-HVDC DC-Link Capacitors Sales Market Share by Type (2021-2026)

Figure 81. Europe VSC-HVDC DC-Link Capacitors Sales Market Share by Application (2021-2026)

Figure 82. Germany VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 83. France VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 84. UK VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 85. Italy VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 86. Russia VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 87. Middle East & Africa VSC-HVDC DC-Link Capacitors Sales Market Share by Country (2021-2026)

Figure 88. Middle East & Africa VSC-HVDC DC-Link Capacitors Sales Market Share by Type (2021-2026)

Figure 89. Middle East & Africa VSC-HVDC DC-Link Capacitors Sales Market Share by Application (2021-2026)

Figure 90. Egypt VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 91. South Africa VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 92. Israel VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 93. Turkey VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 94. GCC Countries VSC-HVDC DC-Link Capacitors Revenue Growth 2021-2026 (\$ millions)

Figure 95. Manufacturing Cost Structure Analysis of VSC-HVDC DC-Link Capacitors in 2026

Figure 96. Manufacturing Process Analysis of VSC-HVDC DC-Link Capacitors

Figure 97. Industry Chain Structure of VSC-HVDC DC-Link Capacitors

Figure 98. Channels of Distribution

Figure 99. Global VSC-HVDC DC-Link Capacitors Sales Market Forecast by Region (2027-2032)

Figure 100. Global VSC-HVDC DC-Link Capacitors Revenue Market Share Forecast by Region (2027-2032)

Figure 101. Global VSC-HVDC DC-Link Capacitors Sales Market Share Forecast by Type (2027-2032)

Figure 102. Global VSC-HVDC DC-Link Capacitors Revenue Market Share Forecast by Type (2027-2032)

Figure 103. Global VSC-HVDC DC-Link Capacitors Sales Market Share Forecast by Application (2027-2032)

Figure 104. Global VSC-HVDC DC-Link Capacitors Revenue Market Share Forecast by Application (2027-2032)

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