

Global Water-Cooled Doubly-Fed Converter Market Growth 2026-2032

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Abstracts

The global Water-Cooled Doubly-Fed Converter market size is predicted to grow from US\$ 581 million in 2025 to US\$ 788 million in 2032; it is expected to grow at a CAGR of 4.5% from 2026 to 2032.

A water-cooled doubly-fed converter is a type of wind power converter that employs liquid-based thermal management technology. It is primarily utilized within Doubly-Fed Induction Generator (DFIG) systems to facilitate the bidirectional exchange and control of energy between the generator rotor and the power grid. Its core function involves regulating the frequency, amplitude, and phase of the rotor current to enable variable-speed, constant-frequency operation of the wind turbine, facilitate active and reactive power control, and ensure stable grid-connected power generation. Compared to traditional air-cooled doubly-fed converters, the liquid-cooled solution utilizes circulating coolant to dissipate the substantial heat generated by power semiconductor devices; consequently, it offers superior heat dissipation efficiency, higher power density, lower noise levels, and enhanced operational stability.

The upstream segment of the industry chain primarily comprises suppliers of core components?including IGBT/SiC power devices, DSP/FPGA control chips, liquid cooling plates, circulation pumps, capacitors, reactors, PCBs, and thermal management materials?with power semiconductors and liquid cooling systems constituting the critical links. The midstream segment consists of enterprises engaged in the design, manufacturing, and system integration of liquid-cooled doubly-fed converters; key technological areas here include PWM control, liquid-based thermal management, Low Voltage Ride-Through (LVRT) capabilities, and high-power-density design. The downstream segment focuses on applications within large-scale onshore wind farms, offshore wind farms, grid-connected new energy systems, and high-power industrial

variable-frequency drive systems; among these, large-scale wind turbines exceeding 10 MW, offshore wind power projects, and high-power-density new energy systems represent the sectors currently experiencing the most rapid growth in demand.

In 2025, global sales volume for water-cooled doubly-fed converters is projected to reach 5,500 units, with a production capacity of approximately 7,800 units. The average selling price is estimated at \$108,000 per unit, with an average gross margin ranging from 25% to 35%.

In terms of demand structure, large-scale onshore wind power remains the largest application market for water-cooled doubly fed converters, accounting for the dominant share of overall demand. In recent years, as the single-unit capacity of wind turbines has steadily increased, the heat dissipation capabilities of traditional air-cooled solutions have gradually approached their limits; consequently, the penetration rate of water-cooled doubly fed converters in units exceeding 5 MW has risen rapidly. Concurrently, the expansion of offshore wind power, the development of wind farms in high-temperature and high-humidity environments, and the construction of large-scale new energy bases are also driving increased demand for highly reliable liquid-cooled converters. Furthermore, rising requirements regarding AI computing power, new energy grid integration, and grid stability are indirectly driving the technological upgrading of high-performance converter control systems.

Regarding product and technology roadmaps, the industry is currently transitioning from traditional IGBT-based air-cooled architectures toward a new paradigm characterized by 'liquid cooling, high power density, SiC integration, and intelligent operation.' Current mainstream products utilize a back-to-back PWM topology, integrated with liquid cooling plates, intelligent temperature control, Low Voltage Ride-Through (LVRT) capabilities, and high-voltage grid-connection control technologies to enhance system efficiency and reliability. With the development of large-scale wind turbines exceeding 10 MW and the expansion of offshore wind power, SiC power devices, modular design, and higher-voltage-class converters are emerging as key technological trends. In the future, AI-driven fault prediction, digital twin-based operation and maintenance, and intelligent thermal management systems are also expected to gradually make inroads into the high-end wind power converter sector.

LP Information, Inc. (LPI) ' newest research report, the "Water-Cooled Doubly-Fed Converter Industry Forecast" looks at past sales and reviews total world Water-Cooled Doubly-Fed Converter sales in 2025, providing a comprehensive analysis by region and market sector of projected Water-Cooled Doubly-Fed Converter sales for 2026 through

2032. With Water-Cooled Doubly-Fed Converter sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Water-Cooled Doubly-Fed Converter industry.

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Water-Cooled Doubly-Fed 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 Water-Cooled Doubly-Fed Converter.

This report presents a comprehensive overview, market shares, and growth opportunities of Water-Cooled Doubly-Fed Converter market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Back-to-Back Converters

Modular Converters

Segmentation by Fan Capacity:

2-3MW

3-5MW

?5MW

Segmentation by Voltage:

690V

950V

1140V

Segmentation by Application:

Onshore Wind Power

Offshore Wind Power

Renewable Energy Grid-Connected Systems

High-Power Industrial Drives

Intelligent Wind Power Systems

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.

Siemens

ABB

GE

Nordex

Ingeteam

Hopewind

Sungrow Power

Dongfang Electric

CRRC Times Electric

Gold Wind

Key Questions Addressed in this Report

What is the 10-year outlook for the global Water-Cooled Doubly-Fed Converter market?

What factors are driving Water-Cooled Doubly-Fed Converter market growth, globally and by region?

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

How do Water-Cooled Doubly-Fed Converter market opportunities vary by end market size?

How does Water-Cooled Doubly-Fed Converter break out by Type, by Application?

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