

DC-DC Converter Market- Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028

Segmented By Input Voltage (5-36V, 36-75V and 75V & Above), By Output Voltage (3.3V, 5V, 12V, 15V & Above), By Mounting Style (Surface Mount and Through Hole), By Application (Smartphone, Servers PCs, EV Battery, Railway Medical Equipment), By Region, Competition

<https://marketpublishers.com/r/D9E2CFDA4C5BEN.html>

Date: October 2023

Pages: 182

Price: US\$ 4,900.00 (Single User License)

ID: D9E2CFDA4C5BEN

Abstracts

The Global DC-DC Converter Market was valued at USD4,683.80 million in 2022 and is estimated to grow from USD4,591.38 million in 2022 to USD 6,3092.59 million by 2028 at a CAGR of 5.3% during forecast period. The market is driven by various factors, such as increasing power consumption and increasing industrial automation. Increasing power consumption throughout various industries and increasing applications in the industrial sector are most likely to drive the market for DC-DC converters. DC-DC converters are also turning out to be major electrical components in the automotive industry, which will rise with the rise in the electric vehicle market of the automotive industry across various regions.

Key Market Drivers

Rising demand for portable electronic devices and applications in renewable energy is expected to drive market growth.

Most semiconductor devices that solely operate on DC electrical power require connection to an external power source, typically an AC-DC converter. These

converters, known as key power electronic components, are crucial for the proper functioning of portable electronic devices like cellphones and laptops. Integrated circuits (ICs) and other components mounted on substrates necessitate different voltage levels for optimal operation. Any instability in the power supply can adversely affect these devices, leading to degradation and malfunctions. Hence, the inclusion of a converter to step up or down the voltage as needed is imperative. The growing demand for enhanced computing power and storage capacity is also driving the need for DC converters. The global semiconductor industry has been experiencing rapid growth, which in turn propels the development of semiconductor devices. Additionally, the increasing pace of semiconductor advancements may further amplify the demand for portable electronics. Technological innovations and digital adoption in emerging economies, particularly in the Asia Pacific region, are contributing to the heightened demand for converters. China, Japan, Taiwan, and South Korea are at the forefront of the semiconductor market in Asia. The COVID-19 pandemic and associated social distancing measures have resulted in increased sales of laptops, driven by the rising trend of remote work.

Increasing Adoption of Electric Vehicles to Drive Sales of DC-DC Converter Devices

DC-DC converters transform high voltage from a vehicle's battery into lower voltages to power various devices within the car, which operate at lower voltages in different electric vehicle configurations. The DC-DC converter in a vehicle reduces the battery voltage to 12 V for common car loads like headlights, window motors, and pumps. Key design considerations for DC-DC converters include low losses, high efficiency, compact size, and lightweight construction. These converters are present in every electric vehicle or hybrid with a high-voltage battery. The DC-DC converter is a vital component of the vehicle, converting voltages to power various onboard systems, increasingly advanced infotainment, and enhanced safety features that utilize Advanced Driver Assistance Systems (ADAS). The growing focus on the environment and renewable and clean energy solutions is expected to drive the demand for electric vehicles and hybrid electric vehicles worldwide. The rising sales of electric vehicles have led to an increased demand for converters. Sales of electric vehicles, including fully electric and plug-in hybrids, have doubled in 2021, reaching a new record of 6.6 million. As of June 2022, the number of charging stations deployed in China has reached 3.9 million, marking a significant increase of 101.2% compared to the same period last year, according to the China Electric Vehicle Charging Infrastructure Promotion Alliance (EVCIPA).

Increasing military COTS applications

Commercial-the-shelf (COTS) products, both hardware and software, are readily available for immediate use. These aftermarket products are tailored to meet consumer needs. As defined by the Federal Acquisition Regulation (FAR) in the US, military COTS refers to commercial items or services that can be utilized under government contracts. With the rising military expenditure worldwide, the demand for military COTS products is projected to fuel the growth of the DC-DC converter market.

Key Market Challenges

Product manufacturing challenges

DC-DC converters and related components are among the most critical elements of integrated circuits used in power electronics equipment. Consequently, manufacturing these components poses a challenge for product manufacturers. These products must be manufactured in compliance with regulatory and safety requirements, such as EN60950 and UL60950 for IT equipment, which serve as regulatory standards to prevent injury or damage caused by potential hazards. As a result, there has been an evolution in the manufacturing of DC-DC converters, with newer technologies offering more compact designs compared to their earlier counterparts. Prominent manufacturing companies, such as Murata and Delta Electronics, have acknowledged the complexity of the manufacturing and design processes for DC-DC converters. According to an article by Texas Instruments, one of the primary challenges faced by DC-DC converter manufacturers is the design of high-frequency, high input voltage converters.

Global shortage of semiconductors

The global manufacturing sector has encountered significant disruptions in global supply chains, leading to a substantial slowdown. The imposition of international travel restrictions and the seismic shifts in demand and supply caused by COVID-19 have profoundly impacted the worldwide distribution network. The scarcity of integrated circuits has severely impacted the supply chain of several key industries, including the DC-DC converter market. As these converters are an integral part of IC boards, the global shortage faced by the power electronics industry has consequently affected the manufacturing and supply chain of DC-DC converters as well.

Key Market Trends

Rise in Adoption of Electric Vehicles

Electric Vehicles (EVs), Hybrid Electric Vehicles (HEVs), and Fuel Cell Electric Vehicles (FCEVs) have emerged as potential substitutes for conventional vehicles in the near future. The adoption process of electric vehicles and the development of the necessary infrastructure have been initiated in recent years. DC-DC converters play a crucial role in interfacing the components of the electric powertrain by either stepping up or stepping down the voltage levels. The continuous advancements in DC-DC converter technology, such as lightweight design, compact size, high efficiency, minimal electromagnetic interference, and low current/voltage ripple, have significantly increased its demand across various applications. Moreover, the increasing environmental concerns and the efforts of several governments to promote cleaner transportation have driven the demand for zero-emission vehicles. Developed nations like the U.S., Germany, and the UK have actively encouraged the adoption of electric vehicles to reduce emissions, resulting in a substantial growth in electric vehicle sales. Furthermore, countries like India and China have witnessed a surge in the adoption of electric buses, contributing to the expansion of the electric commercial automobile industry. It is anticipated that other nations will follow suit and replace their existing fossil fuel-based bus fleets with electric buses. This growing market trend of transitioning to electric buses for public transportation will drive the demand for DC-DC converters in the automotive industry during the forecast period.

Surge in Usage of DC-DC Converter in Railway Application

DC/DC converters are utilized in railway environments to convert DC battery voltages to lower voltages for various control and energy circuits. This is necessary as railway rolling stock relies on a DC power distribution system, enabling battery usage to sustain electrical power during generator failures. Consequently, the railway industry demands the implementation of DC-DC converters in applications such as railway rolling stock, on-board and trackside systems, industrial applications, high voltage battery-powered applications, and distributed power supply architectures. These converters must adhere to the EN 50155 specification to ensure optimal performance in harsh environmental conditions.

Segmental Insights

Input Voltage Insights

The 5–36V segment is expected to dominate the market during the forecast period. DC-DC converters within the 5–36V range provide top-notch I/O isolation and high

performance, catering to network equipment, industrial, railway, and transportation sectors. These converters are suitable for data switching circuits, relay-driven circuits, low-frequency analog circuits, and pure digital circuits. The growing railway and transportation sectors, along with increased utilization of network equipment, are anticipated to unlock significant market potential for DC-DC converters.

Application Insights

The Smartphone segment is expected to dominate the market share throughout the forecast period. Mobile devices primarily rely on battery power supply, which varies daily based on device usage. Smartphones, tablets, and other mobile devices with NFC capabilities demonstrate enhanced operational efficiency due to the implementation of DC-DC converters. Developing a high-efficiency DC-DC converter for these battery-operated systems poses significant challenges, given their unique requirements such as wide input voltage range and dynamic operational load.

Regional Insights

The Asia-Pacific region plays a pivotal role in driving the growth of the DC-DC Converter Market. In this region, the rising consumer demand for electronic devices, such as laptops, personal computers, and cell phones, is expected to fuel the market expansion for DC-DC converters. Moreover, the telecommunications industries of China, Japan, and South Korea are focusing on the development of network infrastructure to support 5G technology, consequently driving the demand for 5G devices. These factors are poised to accelerate the growth of the Asia-Pacific DC-DC converter market. Furthermore, China, Japan, and South Korea being the leading producers of electronic equipment and integrated circuits globally, contribute significantly to the demand for DC-DC converters. The substantial population and increasing demand for electronic applications make Asia-Pacific an attractive market for DC-DC converters. Additionally, the utilization of DC-DC converters in Asia-Pacific is propelled by the need for medical applications like autonomous surgical robots and wireless charging for medical devices, as well as the growth of industrialization and globalization.

Key Market Players

Advanced Energy Industries, Inc.

Analog Devices, Inc.

ABB Ltd

Crane Holdings, Co.

Delta Electronics, Inc.

Flex Ltd

Infineon Technologies AG

Murata Manufacturing Co., Ltd.

NXP Semiconductor

Renesas Electronics Corporation

Report Scope:

In this report, the Global DC-DC Converter Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global DC-DC Converter Market, By Input Voltage:

5-36V

36-75V

75V & above

Global DC-DC Converter Market, By Output Voltage:

3.3V

5V

12V

15V & above

Global DC-DC Converter Market, By Mounting Style:

Surface Mount

Through Hole

Global DC-DC Converter Market, By Application:

Smartphone

Servers PCs

EV Battery

Railway

Medical Equipment

Global DC-DC Converter Market, By Region:

North America

Europe

Latin America

Middle East & Africa

Asia Pacific

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global DC-DC Converter Market.

Available Customizations:

Global DC-DC Converter Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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