

Global Outdoor Liquid Cooling Cycle Integrated Machine Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Outdoor Liquid Cooling Cycle Integrated Machine competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. An Outdoor Liquid Cooling Cycle Integrated Machine is a specialized cooling system designed for outdoor environments, used to manage and dissipate heat generated by high-power electronic equipment or systems. This type of machine integrates a liquid cooling cycle system, which typically includes components like pumps, heat exchangers, coolant circulation systems, and control units, all housed within a single, robust enclosure. The outdoor liquid-cooled integrated cooling system industry chain is characterized by "high barriers to entry for core components and strong synergy in system integration." Upstream suppliers mainly include those for high-efficiency heat exchangers (microchannel/plate type), weather-resistant circulating pumps, environmentally friendly coolants (such as deionized water/ethylene glycol mixtures), temperature control sensors, and corrosion-resistant sealing materials. High-performance pumps and intelligent control modules still partially rely on imports. Midstream system integrators provide standardized or customized solutions integrating heat dissipation, filtration, liquid replenishment, and monitoring, leveraging structural design, flow channel simulation, and IP55+/NEMA 4X outdoor protection capabilities. Downstream applications are widely used in scenarios with stringent requirements for high heat flux density (>10kW/rack) and reliable all-weather operation, such as 5G base stations, edge computing nodes, energy storage power stations, new energy charging piles, and outdoor AI computing cabinets. Driven by the trends of "Eastern data processing and Western computing," the explosive growth of energy storage, and the marginalization of AI, outdoor liquid-cooled integrated cooling systems, with their rapid

deployment, low PUE, and maintenance-free characteristics, are accelerating the replacement of traditional air cooling, propelling the industry chain towards higher integration, intelligence, and domestic production. In 2024, the global production of outdoor liquid-cooled integrated air conditioners reached 25,000 units, with an average selling price of US\$64,000 per unit, a single production line capacity of 1,000 units, and a gross profit margin of 30%. Outdoor liquid-cooled circulating air conditioning units are entering a period of rapid growth driven by the "dual-carbon" goals and the construction of new power systems. The industry exhibits three main characteristics: accelerated domestic substitution, stricter energy efficiency standards, and deeper system integration. On the one hand, domestic companies such as Invik and Shenling, leveraging their cost advantages and rapid response capabilities, have achieved a market share exceeding 70% in the energy storage temperature control field. On the other hand, policies mandating temperature control accuracy of energy storage systems ??? and PUE

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