

Global Advanced Cooling Server Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Advanced Cooling Server market size was valued at US\$ 31701 million in 2025 and is forecast to a readjusted size of US\$ 147712 million by 2032 with a CAGR of 18.5% during review period.

In 2025, global Advanced Cooling Server production reached approximately 15.3 M Units. Prices range from the thousand-yuan level to the million-yuan level. Advanced Cooling Server are server equipment and rack-scale computing systems designed for high-power-density computing environments. They use direct-to-chip liquid cooling, cold-plate cooling, single-phase or two-phase immersion cooling, and hybrid air-liquid cooling architectures to transfer heat from critical heat sources such as CPUs, GPUs, AI accelerators, memory modules, high-speed interconnect chips, switching devices, and power modules into a liquid-based thermal loop.

Advanced Cooling Server should not be viewed as a simple thermal upgrade to conventional servers. They represent a structural shift in high-power-density AI and HPC infrastructure from standalone server procurement toward node-level, rack-level, and cluster-level integrated delivery. Since 2025, AI training clusters, GB200/GB300 NVL-class rack-scale systems, dense 8-GPU servers, and sovereign AI data center projects have sharply increased server thermal design power and rack power density. In these environments, traditional air cooling is increasingly constrained by heat dissipation, acoustic limits, energy efficiency, and physical space. For this reason, this report adopts ?Liquid-Cooled Servers? as the standard market name and defines the statistical boundary around server nodes, complete servers, liquid-cooled AI racks, AI PODs, and rack-scale computing systems. It does not expand the market scope to

standalone CDUs, cooling towers, cold plates, coolant fluids, or data center air-conditioning equipment.

From a supply-side perspective, the global liquid-cooled server market is structured around four major groups: North American platform and branded OEMs, Taiwan-based hyperscale ODMs, Chinese domestic server vendors, and specialized European and Japanese HPC suppliers. North America is led by NVIDIA, Dell, HPE, Supermicro, Aivres, AMAX, and Sanmina/ZT-related manufacturing assets. Taiwan plays a central role in global AI server manufacturing through QCT, Ingrasys, Wiwynn, Pegatron, ASUS, GIGABYTE, and other ODM/OEM suppliers that support Blackwell, HGX, GB200, and GB300 rack-scale platforms. Mainland China has a distinct local supplier base represented by Huawei, H3C, xFusion, Inspur, Sugon, and Nettrix, mainly serving telecom, cloud, government, enterprise AI, and HPC customers. Europe and Japan have fewer suppliers, but Eviden, 2CRSi, Fujitsu, and NEC remain relevant in supercomputing, immersion cooling, and high-end HPC systems.

Demand growth is not evenly distributed across the entire server industry. It is concentrated in AI training, AI inference, high-performance computing, hyperscale cloud clusters, telecom AI data centers, and national supercomputing programs. Many conventional enterprise workloads, low-power edge deployments, and general-purpose servers will continue to use air cooling or hybrid air-liquid designs. Therefore, the liquid-cooled server market should not be estimated by simply applying a broad ratio to the global server market. Under the narrow OEM system-revenue scope used in this report, the global liquid-cooled server market is estimated at USD 30.80 billion in 2025 and USD 52.60 billion in 2026, with a projected CAGR of 20.75% from 2026 to 2032. The growth is mainly driven by rack-scale AI system deployment, increasing accelerator power, tighter data center efficiency requirements, AI factory capital expenditure, and a maturing liquid-cooling supply chain.

From a product-route perspective, direct-to-chip cold-plate cooling is expected to remain the dominant commercial architecture through 2032 because it offers a practical balance among thermal performance, maintainability, reliability, and retrofit feasibility. Immersion cooling has clear value in ultra-high-density HPC, specialized edge environments, and highly energy-sensitive deployments, but its broader adoption depends on coolant compatibility, operational practices, standardization, and customer acceptance. Hybrid air-liquid designs will remain important in retrofit projects and mixed-density data centers. As OCP, ASHRAE, and major server vendors continue to standardize liquid-cooling environments, rack interfaces, coolant loops, and operating practices, liquid-cooled servers are likely to evolve from customized engineering

projects into repeatable platform products.

This report is a detailed and comprehensive analysis for global Advanced Cooling Server market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Advanced Cooling Server market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Advanced Cooling Server market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Advanced Cooling Server market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Advanced Cooling Server market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Advanced Cooling Server

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Advanced Cooling Server market based on the following parameters - company overview, sales quantity, revenue, price, gross

margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include NVIDIA, Foxconn, Quanta, Supermicro, Dell Technologies, Wiyynn, Pegatron, HPE, Lenovo, xFusion, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Advanced Cooling Server market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Cold Plate Liquid Cooling

Immersion Liquid Cooling

Spray Liquid Cooling

Others

Market segment by Cooling Medium

Water-Based Coolant

Mineral Oil

Fluorinated Fluid

Others

Market segment by Power Density Per Cabinet

Low Power Density: ≤30 kW/Rack

Medium Power Density: 30?60 kW/Rack

High Power Density: 60?100 kW/Rack

Ultra-High Power Density: 100?200 kW/Rack

Extreme Power Density: ?200 kW/Rack

Market segment by Application

Artificial Intelligence and Deep Learning

Cloud Computing and Hyperscale Data Centers

High-Performance Computing and Supercomputing Centers

Others

Major players covered

NVIDIA

Foxconn

Quanta

Supermicro

Dell Technologies

Wiwynn

Pegatron

HPE

Lenovo

xFusion

Huawei

ASUS

GIGABYTE

H3C

Aivres

Inspur

Sanmina

Eviden

Fujitsu

Nettrix

Sugon

NEC

2CRSi

AMAX

MiTAC

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Advanced Cooling Server product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Advanced Cooling Server, with price, sales quantity, revenue, and global market share of Advanced Cooling Server from 2021 to 2026.

Chapter 3, the Advanced Cooling Server competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Advanced Cooling Server breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Advanced Cooling Server market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Advanced Cooling Server.

Chapter 14 and 15, to describe Advanced Cooling Server sales channel, distributors, customers, research findings and conclusion.

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