

Global Advanced Cooling Server Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Advanced Cooling Server market size is expected to reach \$ 147712 million by 2032, rising at a market growth of 18.5% CAGR during the forecast period (2026-2032).

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 studies the global Advanced Cooling Server production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Advanced Cooling Server and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Advanced Cooling Server that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Advanced Cooling Server total production and demand, 2021-2032, (K Units)

Global Advanced Cooling Server total production value, 2021-2032, (USD Million)

Global Advanced Cooling Server production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Advanced Cooling Server consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Advanced Cooling Server domestic production, consumption, key domestic manufacturers and share

Global Advanced Cooling Server production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Advanced Cooling Server production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Advanced Cooling Server production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Advanced Cooling Server market based on the following parameters - company overview, production, value, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Advanced Cooling Server market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Advanced Cooling Server Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Advanced Cooling Server Market, Segmentation by Type:

Cold Plate Liquid Cooling

Immersion Liquid Cooling

Spray Liquid Cooling

Others

Global Advanced Cooling Server Market, Segmentation by Cooling Medium:

Water-Based Coolant

Mineral Oil

Fluorinated Fluid

Others

Global Advanced Cooling Server Market, Segmentation by Power Density Per Cabinet:

Low Power Density: ≤ 30 kW/Rack

Medium Power Density: $30 \leq 60$ kW/Rack

High Power Density: $60 \leq 100$ kW/Rack

Ultra-High Power Density: $100 \leq 200$ kW/Rack

Extreme Power Density: ≥ 200 kW/Rack

Global Advanced Cooling Server Market, Segmentation by Application:

Artificial Intelligence and Deep Learning

Cloud Computing and Hyperscale Data Centers

High-Performance Computing and Supercomputing Centers

Others

Companies Profiled:

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

Key Questions Answered:

1. How big is the global Advanced Cooling Server market?
2. What is the demand of the global Advanced Cooling Server market?
3. What is the year over year growth of the global Advanced Cooling Server market?
4. What is the production and production value of the global Advanced Cooling Server market?
5. Who are the key producers in the global Advanced Cooling Server market?
6. What are the growth factors driving the market demand?

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