

Global AI Datacenter Liquid Cooling 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 AI Datacenter Liquid Cooling market size was valued at US\$ 5658 million in 2025 and is forecast to a readjusted size of US\$ 16444 million by 2032 with a CAGR of 16.1% during review period.

AI datacenter liquid cooling refers to thermal management systems that use liquid as the heat transfer medium to remove heat from high-power computing components?primarily GPUs, TPUs, and AI accelerators?in artificial intelligence data centers. Unlike traditional air cooling, which reaches physical limits at approximately 41.3kW per rack, liquid cooling leverages superior thermodynamic properties (specific heat capacity 3-4x higher than air) to manage thermal densities exceeding 100kW per rack. Key technologies include direct-to-chip cold plate cooling, immersion cooling (single-phase and two-phase), and spray cooling. From a value chain perspective, upstream includes coolant distribution units (CDUs), cold plates, manifolds, coolant fluids (dielectric fluorinated fluids), pumps, connectors, and heat exchangers; midstream involves liquid cooling solution integration (cooling loop design, rack-level distribution, thermal simulation), provided by solution vendors, server OEMs, and datacenter infrastructure builders; downstream demand spans hyperscale data centers (AWS, Google, Microsoft, Meta), colocation providers, AI training clusters, and enterprise AI infrastructure. In 2025, the average selling price is approximately US\$2,800 per kW, global installed capacity is about 1,964 MW, and gross margins generally range from 25% to 45%, driven by CDU costs, cold plate precision requirements, coolant fluid prices, and system integration complexity.

This report is a detailed and comprehensive analysis for global AI Datacenter Liquid

Cooling 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 AI Datacenter Liquid Cooling market size and forecasts, in consumption value (\$ Million), sales quantity (MW), and average selling prices (US\$/KW), 2021-2032

Global AI Datacenter Liquid Cooling market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (MW), and average selling prices (US\$/KW), 2021-2032

Global AI Datacenter Liquid Cooling market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (MW), and average selling prices (US\$/KW), 2021-2032

Global AI Datacenter Liquid Cooling market shares of main players, shipments in revenue (\$ Million), sales quantity (MW), and ASP (US\$/KW), 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 AI Datacenter Liquid Cooling

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 AI Datacenter Liquid Cooling 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 Vertiv Holdings Co., Schneider Electric SE, nVent Electric Plc, CoolIT Systems Inc., Motivair Corporation, Asetek

Danmark AS, Iceotope Technologies Ltd., LiquidStack BV, Boyd Corporation, Delta Electronics Inc., etc.

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

Market Segmentation

AI Datacenter Liquid Cooling 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

Liquid-to-Air (L2A) Cooling

Liquid-to-Liquid (L2L) Cooling

Market segment by Power Density

Medium Density (50-100 kW/rack)

High Density (100-200 kW/rack)

Ultra-High Density (> 200 kW/rack)

Market segment by Price Tier (Per kW)

Economy / Cold Plate (
Standard / L2A (US\$2,000-3,500/kW)

Premium / Immersion (> US\$3,500/kW)

Market segment by Application

Hyperscale Data Centers

Colocation Data Centers

AI Training Clusters

Edge Computing Infrastructure

Others

Major players covered

Vertiv Holdings Co.

Schneider Electric SE

nVent Electric Plc

CoolIT Systems Inc.

Motivair Corporation

Asetek Danmark AS

Iceotope Technologies Ltd.

LiquidStack BV

Boyd Corporation

Delta Electronics Inc.

STULZ GmbH

Rittal GmbH & Co. KG

Dell Technologies Inc.

Hewlett Packard Enterprise Co.

Lenovo Group Ltd.

Super Micro Computer Inc.

Fujitsu Ltd.

Danfoss AS

Chilidyne

Auras Technology Co., Ltd.

AVC (Asia Vital Components)

Cooler Master Co., Ltd.

Envicool

Goaland

Shenling

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 AI Datacenter Liquid Cooling product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the AI Datacenter Liquid Cooling 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 AI Datacenter Liquid Cooling 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 AI Datacenter Liquid Cooling.

Chapter 14 and 15, to describe AI Datacenter Liquid Cooling sales channel, distributors, customers, research findings and conclusion.

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