

Global AI Datacenter Liquid Cooling Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global AI Datacenter Liquid Cooling market size is expected to reach \$ 16444 million by 2032, rising at a market growth of 16.1% CAGR during the forecast period (2026-2032).

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 studies the global AI Datacenter Liquid Cooling production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for AI Datacenter Liquid Cooling 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 AI Datacenter Liquid Cooling that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global AI Datacenter Liquid Cooling total production and demand, 2021-2032, (MW)
Global AI Datacenter Liquid Cooling total production value, 2021-2032, (USD Million)
Global AI Datacenter Liquid Cooling production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (MW), (based on production site)
Global AI Datacenter Liquid Cooling consumption by region & country, CAGR, 2021-2032 & (MW)
U.S. VS China: AI Datacenter Liquid Cooling domestic production, consumption, key domestic manufacturers and share
Global AI Datacenter Liquid Cooling production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (MW)
Global AI Datacenter Liquid Cooling production by Type, production, value, CAGR, 2021-2032, (USD Million) & (MW)
Global AI Datacenter Liquid Cooling production by Application, production, value, CAGR, 2021-2032, (USD Million) & (MW)

This report profiles key players in the global AI Datacenter Liquid Cooling 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World AI Datacenter Liquid Cooling market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$

Millions), volume (production, consumption) & (MW) and average price (US\$/KW) 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 AI Datacenter Liquid Cooling Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global AI Datacenter Liquid Cooling Market, Segmentation by Type:

Liquid-to-Air (L2A) Cooling

Liquid-to-Liquid (L2L) Cooling

Global AI Datacenter Liquid Cooling Market, Segmentation by Power Density:

Medium Density (50-100 kW/rack)

High Density (100-200 kW/rack)

Ultra-High Density (> 200 kW/rack)

Global AI Datacenter Liquid Cooling Market, Segmentation by Price Tier (Per kW):

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

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

Global AI Datacenter Liquid Cooling Market, Segmentation by Application:

Hyperscale Data Centers

Colocation Data Centers

AI Training Clusters

Edge Computing Infrastructure

Others

Companies Profiled:

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

Key Questions Answered:

1. How big is the global AI Datacenter Liquid Cooling market?
2. What is the demand of the global AI Datacenter Liquid Cooling market?
3. What is the year over year growth of the global AI Datacenter Liquid Cooling market?

4. What is the production and production value of the global AI Datacenter Liquid Cooling market?
5. Who are the key producers in the global AI Datacenter Liquid Cooling market?
6. What are the growth factors driving the market demand?

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