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Global AI Server Liquid Cooling Piping Components Market 2026 by Company, Regions, Type and Application, Forecast to 2032

https://marketpublishers.com/r/G74BADB8AF0FEN.html
Date: September 2026
Pages: 133
Price: US$ 3,480.00 (Single User License)
ID: G74BADB8AF0FEN

Abstracts

According to our (Global Info Research) latest study, the global AI Server Liquid Cooling Piping Components market size was valued at US$ 1614 million in 2025 and is forecast to a readjusted size of US$ 3969 million by 2032 with a CAGR of 13.7% during review period.

AI Server Liquid Cooling Piping Components refer to fluid transmission and connection components used in liquid cooling systems for artificial intelligence servers, high-performance computing (HPC) servers, and high-density data centers. These components enable efficient coolant circulation between cooling distribution units (CDUs), cold plates, manifolds, pumps, heat exchangers, and other thermal management equipment. The product scope mainly covers liquid cooling hoses, rigid piping, quick connectors, pipe fittings, valves, manifolds, sealing components, and related fluid control parts. These components require high pressure resistance, low leakage performance, corrosion resistance, low ion precipitation, thermal reliability, and long-term durability under continuous liquid cooling operation.

Key Findings

AI server liquid cooling piping components are essential infrastructure parts for high-density AI computing thermal management systems

Rack-level and cold plate liquid cooling architectures represent the primary demand areas for piping components

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North America leads the high-performance data center liquid cooling component market with strong AI infrastructure investment

Quick connectors and manifolds are becoming critical components for scalable liquid cooling deployment

Major suppliers compete through reliability, customization capability, and global data center supply chains

Market Trends

The AI Server Liquid Cooling Piping Components market is experiencing rapid technological evolution driven by increasing server power density and the transition from traditional air cooling to advanced liquid cooling solutions. AI accelerator platforms with higher thermal design power requirements are accelerating the adoption of cold plate liquid cooling, rack-level liquid cooling, and customized coolant distribution systems. Future product development is focused on improving connector reliability, reducing leakage risks, enhancing material compatibility with different coolant types, and supporting higher flow rates. Suppliers are increasingly developing integrated piping assemblies combining hoses, manifolds, connectors, and monitoring functions to meet the requirements of hyperscale data centers and AI computing clusters.

Market Dynamics

Drivers

The primary growth drivers include the expansion of artificial intelligence computing infrastructure, increasing deployment of GPU-based servers, rising rack power density, and growing demand for energy-efficient data centers. As conventional air cooling becomes insufficient for next-generation AI servers, liquid cooling systems require higher-performance piping components capable of stable operation under high thermal loads. Government investment in digital infrastructure and hyperscale cloud computing expansion further accelerate adoption.

Restraints

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Market development is constrained by high qualification requirements, strict reliability standards, complex integration processes, and limited supplier experience in advanced liquid cooling applications. Component failures such as leakage or contamination can cause significant damage to expensive computing equipment, resulting in demanding certification and testing requirements. The diversity of coolant materials and system architectures also increases product development complexity.

Opportunities

Future opportunities are concentrated in AI data centers, supercomputing facilities, edge AI infrastructure, and next-generation rack-level cooling systems. The increasing adoption of direct-to-chip cooling and higher-density computing platforms creates demand for advanced quick connectors, high-performance hoses, and customized manifolds. Companies with strong precision manufacturing capabilities, sealing technologies, and thermal management expertise are expected to benefit from market expansion.

Challenges

The industry faces challenges including rapid technology changes, uncertainty in liquid cooling architecture standards, supply chain requirements from global data center operators, and increasing competition among component manufacturers. Maintaining long-term reliability while reducing manufacturing costs and achieving compatibility with emerging cooling technologies will remain critical challenges.Industry Chain Analysis

The industry chain of AI Server Liquid Cooling Piping Components consists of upstream materials and component suppliers, midstream component manufacturers, and downstream system integrators and end users. Upstream suppliers provide engineering plastics, stainless steel, copper alloys, sealing materials, precision machining components, and surface treatment technologies. Midstream manufacturers produce liquid cooling hoses, quick connectors, manifolds, valves, and integrated piping assemblies through precision manufacturing and reliability testing. Downstream markets include AI data centers, cloud service providers, telecommunications operators, government computing centers, healthcare computing platforms, and HPC facilities, where liquid cooling systems are deployed to support high-performance computing operations.

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Value Chain Analysis

Value creation in AI server liquid cooling piping components is mainly generated through material engineering, precision manufacturing, reliability validation, and system integration capabilities. Manufacturers with advanced sealing technologies, low-leakage connector designs, and customized engineering services can achieve higher added value. Close cooperation with server manufacturers, liquid cooling solution providers, and data center operators is becoming increasingly important for maintaining competitiveness.

Segment Insights

By product type, quick connectors, liquid cooling manifolds, and high-performance hoses represent the core segments of the market because they directly affect coolant circulation efficiency, maintenance convenience, and system reliability. Quick connectors are particularly important for rack-level liquid cooling deployment due to their role in enabling rapid installation and serviceability. By liquid cooling structure, cold plate liquid cooling currently represents the mainstream architecture for AI servers, while rack-level liquid cooling is becoming a fast-growing direction as rack power density increases. Immersion liquid cooling requires specialized piping solutions with stronger coolant compatibility and sealing performance.

Downstream Market Opportunities

The downstream demand for AI server liquid cooling piping components is mainly generated by hyperscale data centers, cloud computing companies, AI infrastructure operators, telecommunications networks, government computing platforms, and research supercomputing centers. AI training clusters and large-scale inference facilities are expected to create significant demand because these applications require continuous operation, high computing density, and reliable thermal management systems. The expansion of enterprise AI adoption will further broaden opportunities beyond traditional data center customers.

Regional Insights

North America represents one of the leading regional markets due to strong AI infrastructure investment, large-scale cloud service providers, and advanced data

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center development. Europe maintains demand through energy efficiency requirements and sustainable data center initiatives. Asia-Pacific is becoming a major growth region driven by AI server manufacturing capacity, semiconductor ecosystem development, and rapid expansion of digital infrastructure in China, Japan, South Korea, and Taiwan. Regional competition is increasingly focused on localized supply chains, engineering response capabilities, and cooperation with data center ecosystem partners.

Competitive Landscape Analysis

The competitive landscape of AI Server Liquid Cooling Piping Components includes global fluid control specialists, thermal management companies, precision component manufacturers, and regional liquid cooling solution providers. Companies such as Parker Hannifin, Gates, Danfoss, Swagelok, Colder Products Company, Nitto Kohki, Stäubli, and Boyd Corporation have strong capabilities in fluid connection technologies and industrial cooling applications. Chinese and Taiwan-based companies including Envicool, Goaland, FRD, Tongfei, Auras, and related precision component suppliers are strengthening their positions through AI data center liquid cooling deployment. Competition is increasingly centered on leakage prevention, connector reliability, customization capability, manufacturing scale, and integration with complete liquid cooling solutions.

Report Scope

This report is a detailed and comprehensive analysis for global AI Server Liquid Cooling Piping Components market. Both quantitative and qualitative analyses are presented by company, 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 Server Liquid Cooling Piping Components market size and forecasts, in consumption value ($ Million), 2021-2032

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Global AI Server Liquid Cooling Piping Components market size and forecasts by region and country, in consumption value ($ Million), 2021-2032

Global AI Server Liquid Cooling Piping Components market size and forecasts, by Type and by Application, in consumption value ($ Million), 2021-2032

Global AI Server Liquid Cooling Piping Components market shares of main players, in revenue ($ Million), 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 Server Liquid Cooling Piping Components

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 Server Liquid Cooling Piping Components market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Parker Hannifin, Gates, Danfoss, Auras, Boyd Corporation, Nitto Kohki, Stäubli, Vertiv, nVent, Colder Products Company, etc.

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

AI Server Liquid Cooling Piping Components 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. This analysis can help you expand your business by targeting qualified niche markets.

Market segmentation

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Market segment by Type

Liquid Cooling Hose

Quick Connectors

Liquid Cooling Manifolds

Others

Market segment by Liquid Cooling Structures

Cold Plate Liquid Cooling

Immersion Liquid Cooling

Rack-Level Liquid Cooling

Market segment by Application

Telecommunications

Government

Healthcare

Other

Market segment by players, this report covers

Parker Hannifin

Gates

Danfoss

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Auras

Boyd Corporation

Nitto Kohki

Stäubli

Vertiv

nVent

Colder Products Company

Swagelok

Remindore Technology

Envicool Technology Co., Ltd.

Guangzhou Goaland Energy Conservation Tech. Co., Ltd

Shenzhen FRD Science & Technology Co., Ltd.

Jonhon Optronic Technology Co., Ltd.

Tongfei Co., Ltd.

Yimikang Tech. Group Co., Ltd.

Zhongding Group

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

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Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe AI Server Liquid Cooling Piping Components product scope, market overview, market estimation caveats and base year.
Chapter 2, to profile the top players of AI Server Liquid Cooling Piping Components, with revenue, gross margin, and global market share of AI Server Liquid Cooling Piping Components from 2021 to 2026.
Chapter 3, the AI Server Liquid Cooling Piping Components competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.
Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.
Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026.and AI Server Liquid Cooling Piping Components market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.
Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.
Chapter 12, the key raw materials and key suppliers, and industry chain of AI Server Liquid Cooling Piping Components.
Chapter 13, to describe AI Server Liquid Cooling Piping Components research findings and conclusion.

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