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Global AI Server Liquid Cooling System Connectors Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global AI Server Liquid Cooling System Connectors market size is expected to reach $ 1460 million by 2032, rising at a market growth of 11.7% CAGR during the forecast period (2026-2032).

AI Server Liquid Cooling System Connectors refer to precision fluid connection components designed for high-performance AI servers, GPU computing platforms, and liquid-cooled data center infrastructure. These connectors enable reliable coolant circulation between cold plates, coolant distribution units (CDUs), rack-level cooling loops, and server-side liquid cooling modules through functions such as quick connection, blind mating, sealing, flow control, and maintenance replacement. The product category covers quick disconnect couplings, blind-mate connectors, valve-controlled connectors, rotary connectors, liquid cooling hose connectors, and customized rack liquid cooling connection modules. The market focuses on connector solutions used in AI computing environments where high power density, thermal management reliability, leakage prevention, and operational efficiency are critical requirements.

Key Findings

Global AI server liquid cooling connectors reached approximately 8.1 million units in production in 2025

Average selling price of AI server liquid cooling connectors was around US$80 per unit in 2025

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Global production capacity reached approximately 10 million units in 2025

Industry average gross margin reached approximately 39%

Cold plate liquid cooling connectors represent the dominant product category in AI server cooling infrastructure

Market Trends

The AI Server Liquid Cooling System Connectors market is undergoing rapid transformation driven by increasing AI computing power density and the transition from air cooling to advanced liquid cooling architectures. The adoption of NVIDIA HGX, GB200, GB300 NVL platforms and next-generation AI clusters is accelerating demand for high-performance coolant connection components with higher pressure tolerance, lower leakage rates, improved thermal reliability, and longer maintenance cycles. Future product development is moving toward higher-flow connectors, automated blind-mating structures, intelligent monitoring capabilities, and standardized rack-level liquid cooling interfaces. Suppliers are increasingly focusing on connector miniaturization, material optimization, corrosion resistance, and compatibility with next-generation single-phase and two-phase cooling solutions.

Market Dynamics

Drivers

The primary growth drivers include rapid expansion of AI data centers, increasing GPU and accelerator power consumption, rising rack power density, and growing adoption of liquid cooling systems. Traditional air cooling solutions are becoming insufficient for high-performance AI servers with rack power levels increasing from conventional 10–20kW ranges toward 50–150kW and above. This transition creates strong demand for reliable liquid cooling connectors capable of supporting high-flow coolant circulation, reducing maintenance risks, and improving overall data center energy efficiency.

Restraints

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Market development is constrained by high precision manufacturing requirements, strict reliability standards, complex qualification processes, and the need for long-term compatibility with different liquid cooling architectures. Connector failures may result in coolant leakage, equipment damage, and costly downtime, requiring suppliers to maintain advanced sealing technologies, material engineering capabilities, and rigorous testing systems. In addition, industry standardization of liquid cooling interfaces is still evolving, increasing customization requirements.

Opportunities

Future opportunities are concentrated in AI supercomputing infrastructure, hyperscale data centers, edge AI servers, and next-generation accelerator platforms. The increasing deployment of rack-scale liquid cooling systems creates opportunities for suppliers developing high-density blind-mate connectors, intelligent liquid monitoring connectors, and integrated cooling interface solutions. Expansion of AI infrastructure in Asia-Pacific, North America, and Europe will further stimulate demand for advanced liquid cooling components.

Challenges

The industry faces challenges including technology iteration speed, customer-specific customization requirements, supply chain qualification barriers, and competition from established precision connector manufacturers. Suppliers must continuously improve connector reliability under higher pressure, temperature variation, and long-term operating conditions while maintaining cost competitiveness. The transition from prototype AI systems to large-scale commercial deployment also requires stable production capacity and global service capabilities.Industry Chain Analysis

The AI Server Liquid Cooling System Connectors industry chain consists of upstream raw materials, midstream connector manufacturing, and downstream AI infrastructure applications. The upstream segment includes engineering plastics, stainless steel, copper alloys, sealing materials, precision machining equipment, and surface treatment technologies. The midstream segment covers connector design, precision molding, machining, assembly, testing, and customized liquid cooling interface development. The downstream segment includes GPU AI servers, TPU servers, NPU/ASIC servers, FPGA servers, AI data centers, and high-performance computing facilities. Value creation mainly comes from precision manufacturing capability, sealing reliability, thermal management compatibility, and customized engineering services.

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Value Chain Analysis

The value chain of AI Server Liquid Cooling System Connectors is centered on engineering design, manufacturing precision, reliability validation, and system integration. Material suppliers provide high-performance corrosion-resistant materials and sealing solutions, while connector manufacturers create differentiated value through fluid control design, low leakage performance, rapid maintenance structures, and compatibility with emerging AI server platforms. System integrators and data center operators influence product specifications through deployment requirements, creating a market environment where technical capability and customer collaboration are key competitive factors.

Segment Insights

By coolant type, AI server liquid cooling connectors are mainly divided into single-phase liquid cooling connectors, dual-phase liquid cooling connectors, and other specialized solutions. Single-phase liquid cooling connectors currently represent the mainstream market because of their mature technology, relatively simple system architecture, and broad adoption in cold plate cooling applications. Dual-phase liquid cooling connectors are attracting increasing attention due to their potential advantages in extremely high-density computing environments, although higher technical complexity limits widespread deployment.

By liquid cooling technology route, cold plate liquid cooling connectors represent the largest segment, supported by rapid adoption in GPU-based AI servers and rack-scale cooling systems. Immersion cooling connectors are an emerging segment benefiting from future high-density computing requirements, requiring specialized materials, sealing technologies, and fluid compatibility solutions.

Downstream Market Opportunities

The major downstream opportunities are concentrated in GPU AI servers, TPU servers, NPU/ASIC AI servers, FPGA servers, and AI-oriented data center infrastructure. GPU AI servers currently represent the largest demand source due to accelerated AI model training and inference deployment. Future growth opportunities are expected from hyperscale AI clusters, enterprise AI infrastructure, and customized accelerator systems

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requiring higher cooling efficiency and reliable liquid connection solutions.

Regional Insights

North America represents one of the most advanced regions for AI server liquid cooling connector adoption due to strong hyperscale data center investment, AI infrastructure expansion, and advanced semiconductor ecosystems. The region has significant demand for high-performance cooling components supporting large-scale AI computing deployments.

Asia-Pacific is becoming a major growth region driven by AI server manufacturing, semiconductor supply chains, and expanding data center construction. China, Japan, South Korea, and Taiwan are important production and technology centers, with strong capabilities in precision manufacturing, connector production, and liquid cooling component supply. Europe is also increasing investment in energy-efficient data center infrastructure, creating additional opportunities for liquid cooling technologies.

Competitive Landscape Analysis

The competitive landscape of AI Server Liquid Cooling System Connectors includes global precision connector manufacturers, industrial fluid control companies, and specialized liquid cooling component suppliers. Leading companies compete through connector reliability, sealing technology, pressure resistance, manufacturing capability, and compatibility with AI server platforms. Established fluid connector manufacturers such as Stäubli, Parker Hannifin, Colder Products Company, Danfoss, and Nitto Kohki have strong expertise in quick disconnect and fluid management technologies. Precision component suppliers in Asia, including China Aviation Optical-Electrical Technology, Zhongding Sealing Parts, Fortune Force (Auras), Envicool, Nidec, Sumitomo Electric, Molex, Lingyi iTech, and Everwin Precision, are expanding capabilities in AI data center liquid cooling applications. Future competition will focus on high-flow connector technology, rack-level cooling integration, production scalability, and cooperation with AI server ecosystem companies.

Report Scope

This report studies the global AI Server Liquid Cooling System Connectors production,

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demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global AI Server Liquid Cooling System Connectors total production and demand, 2021-2032, (Units)

Global AI Server Liquid Cooling System Connectors total production value, 2021-2032, (USD Million)

Global AI Server Liquid Cooling System Connectors production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global AI Server Liquid Cooling System Connectors consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: AI Server Liquid Cooling System Connectors domestic production, consumption, key domestic manufacturers and share

Global AI Server Liquid Cooling System Connectors production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global AI Server Liquid Cooling System Connectors production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global AI Server Liquid Cooling System Connectors production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

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This report profiles key players in the global AI Server Liquid Cooling System Connectors 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 Stäubli, Parker Hannifin, Colder Products Company (CPC), Danfoss, Nitto Kohki, China Aviation Optical-Electrical Technology Co., Ltd., Anhui Zhongding Sealing Parts Co., Ltd., Fortune Force(Auras), Shenzhen Envicool Technology Co., Ltd., Nidec, 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 Server Liquid Cooling System Connectors market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (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 AI Server Liquid Cooling System Connectors Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

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India

Rest of World

Market Segmentation

Global AI Server Liquid Cooling System Connectors Market, Segmentation by Type:

Single-Phase Liquid Cooling Joint

Dual-Phase Liquid Cooling Joint

Others

Global AI Server Liquid Cooling System Connectors Market, Segmentation by Liquid Cooling Technology Routes:

Cold Plate Type Liquid Cooling Joint

Immersion Type Liquid Cooling Joint

Global AI Server Liquid Cooling System Connectors Market, Segmentation by Application:

GPU AI Servers

TPU Servers

NPU / ASIC AI Servers

FPGA AI Servers

Others

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Companies Profiled:

Stäubli

Parker Hannifin

Colder Products Company (CPC)

Danfoss

Nitto Kohki

China Aviation Optical-Electrical Technology Co., Ltd.

Anhui Zhongding Sealing Parts Co., Ltd.

Fortune Force(Auras)

Shenzhen Envicool Technology Co., Ltd.

Nidec

Sumitomo Electric

Molex

Lingyi iTech (Guangdong) Company Limited

Shenzhen Everwin Precision Technology Co., Ltd.

Key Questions Answered

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

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4. What is the total value of the global AI Server Liquid Cooling System Connectors market?
5. Who are the Major Players in the global AI Server Liquid Cooling System Connectors market?
6. What are the growth factors driving the market demand?

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