

Global Cabinet Liquid Cooled Server Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Cabinet Liquid Cooled Server market size is expected to reach \$ 2076 million by 2032, rising at a market growth of 10.0% CAGR during the forecast period (2026-2032).

Cabinet Liquid Cooled Server refers to a high-density server system integrated within a rack or cabinet that uses liquid cooling technologies (such as direct-to-chip, immersion, or rear-door heat exchangers) instead of or alongside traditional air cooling to efficiently dissipate heat generated by CPUs, GPUs, and memory in high-performance computing environments, improving energy efficiency, thermal management, and computing density.

The cabinet liquid cooled server industry chain begins upstream with suppliers of semiconductors, server components, cooling fluids, pumps, heat exchangers, and precision manufacturing materials, followed by midstream system integrators and OEMs that design, assemble, and optimize liquid cooling server cabinets and data center solutions, and extends downstream to hyperscale cloud providers, telecom operators, enterprises, and research institutions deploying these systems in data centers, where demand is driven by AI workloads, energy efficiency requirements, and high-density computing needs, supported by service providers offering installation, maintenance, and thermal management optimization solutions.

Globally, numerous projects under construction and planning include hyperscale data centers adopting liquid cooled racks in North America for AI model training clusters, European green data center initiatives integrating immersion cooling systems, large-scale cloud infrastructure expansions in China deploying direct-to-chip liquid cooling cabinets, edge data center pilots in Southeast Asia using compact liquid cooled racks,

government-backed supercomputing facilities in Japan and Europe upgrading to liquid cooling technologies, and enterprise-level deployments in finance and telecom sectors, all aiming to reduce power usage effectiveness, support high-density GPUs, and meet sustainability targets through advanced thermal management solutions.

2025 Global Market Average Gross Profit Margin: 28%.

The cabinet liquid cooled server market is experiencing rapid growth driven by the exponential rise in AI workloads, high-performance computing, and data-intensive applications that exceed the thermal limits of traditional air-cooled systems. Over the past few years, increasing rack power densities—often exceeding 30–80 kW—have made liquid cooling not just an option but a necessity, especially for GPU-intensive environments.

From a regional perspective, North America leads the market due to strong investments by hyperscale cloud providers and AI companies, while China is rapidly scaling deployments through government-backed data center expansion and digital infrastructure policies. Europe is focusing on sustainable and energy-efficient data centers, accelerating adoption of liquid cooling to meet strict environmental regulations.

Market opportunities are substantial, particularly in AI training clusters, edge computing, and green data center transformation, where liquid cooling significantly reduces energy consumption and operational costs. However, risks include high initial capital expenditure, complexity of deployment, concerns over leakage and maintenance, and lack of standardized infrastructure across legacy data centers. Technological trends show a shift toward immersion cooling and two-phase cooling systems, along with increasing integration of intelligent monitoring and automation.

Competitive characteristics of the market are defined by strong participation from server OEMs, cooling technology specialists, and data center solution providers, with differentiation based on thermal efficiency, reliability, and integration capabilities. Strategic partnerships between chip manufacturers, cloud providers, and cooling solution companies are intensifying, indicating a move toward vertically integrated ecosystems and customized high-performance solutions.

This report studies the global Cabinet Liquid Cooled Server demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Cabinet

Liquid Cooled 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 Cabinet Liquid Cooled Server that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Cabinet Liquid Cooled Server total market, 2021-2032, (USD Million)

Global Cabinet Liquid Cooled Server total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Cabinet Liquid Cooled Server total market, key domestic companies, and share, (USD Million)

Global Cabinet Liquid Cooled Server revenue by player, revenue and market share 2021-2026, (USD Million)

Global Cabinet Liquid Cooled Server total market by Type, CAGR, 2021-2032, (USD Million)

Global Cabinet Liquid Cooled Server total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Cabinet Liquid Cooled Server 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 Vertiv, Dell Technologies, Supermicro, HP, ZTE, PowerLeader, Fusion, Inspur Information, Ningchang, Lenovo, 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 Cabinet Liquid Cooled Server market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 Cabinet Liquid Cooled Server Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Cabinet Liquid Cooled Server Market, Segmentation by Type:

Full Liquid Cooling

Non-Full Liquid Cooling

Global Cabinet Liquid Cooled Server Market, Segmentation by Structural Type:

Cold Plate Type

Immersion Type

Global Cabinet Liquid Cooled Server Market, Segmentation by Rack Density:

30 kW per Rack

Global Cabinet Liquid Cooled Server Market, Segmentation by Application:

Data Center

Cloud Computing

Big Data

Others

Companies Profiled:

Vertiv

Dell Technologies

Supermicro

HP

ZTE

PowerLeader

Fusion

Inspur Information

Ningchang

Lenovo

Huawei

New H3C Technologies

BEEHE

NEC Corporation

Schneider Electric

Key Questions Answered

1. How big is the global Cabinet Liquid Cooled Server market?
2. What is the demand of the global Cabinet Liquid Cooled Server market?
3. What is the year over year growth of the global Cabinet Liquid Cooled Server market?
4. What is the total value of the global Cabinet Liquid Cooled Server market?
5. Who are the Major Players in the global Cabinet Liquid Cooled Server market?
6. What are the growth factors driving the market demand?

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