

Global Containerized Liquid-Cooled AI Server Pods Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G0E2A6938BA4EN.html>

Date: August 2026

Pages: 143

Price: US\$ 3,480.00 (Single User License)

ID: G0E2A6938BA4EN

Abstracts

According to our (Global Info Research) latest study, the global Containerized Liquid-Cooled AI Server Pods market size was valued at US\$ 1064 million in 2025 and is forecast to a readjusted size of US\$ 4280 million by 2032 with a CAGR of 18.1% during review period.

Containerized Liquid-Cooled AI Server Pods are prefabricated high-density computing infrastructure products designed for AI training, AI inference, HPC, edge AI computing, telecom intelligent computing nodes, and rapid data center capacity expansion. In essence, they are transportable, crane-liftable, and rapidly scalable liquid-cooled mini data center units. They are not standalone cooling devices or ordinary server racks, but integrated infrastructure systems that place the container structure, liquid cooling, power distribution, monitoring, fire protection, cabling, and operating environment required for AI server deployment into a standardized or customized modular enclosure. This allows users to build independent AI computing nodes quickly in industrial parks, existing facilities, edge sites, or overseas project locations. The product is typically delivered as a 20-foot, 40-foot, or customized modular container unit integrating AI server racks, power distribution, direct-to-chip liquid cooling or immersion liquid cooling systems, CDUs, manifolds, liquid cooling piping, monitoring systems, fire protection, cabling, and environmental control units. Its core value lies in factory prefabrication, system-level integration, pressure testing, thermal load validation, and fast on-site deployment, enabling high-power AI server clusters to achieve faster deployment, stable heat removal, better energy efficiency, and standardized operation and maintenance. Key specifications include IT load per pod, rack power density, cooling architecture, supply and return liquid temperature, PUE, redundancy level, container size, deployment cycle, and compatibility with GPU server platforms. In 2025, the global average price of

Containerized Liquid-Cooled AI Server Pods was approximately USD 0.95 million per unit, shipment volume was about 1,090 units, and the industry average gross margin was around 25% to 35%.

Containerized Liquid-Cooled AI Server Pods are not simply cooling equipment, nor are they conventional containerized data centers. They are system-level infrastructure products created by integrating high-density AI computing, liquid cooling, power distribution, structural container engineering, monitoring, fire protection, and field deployment capability. The upstream supply chain includes CDUs, cold plates, immersion tanks, pumps, valves, quick connectors, piping, heat exchangers, UPS systems, power distribution cabinets, sensors, fire protection modules, and container structures. The midstream consists of manufacturers capable of modular design, factory prefabrication, liquid cooling integration, testing, and on-site delivery. The downstream customer base is mainly composed of cloud service providers, AI computing operators, telecom operators, supercomputing centers, research institutions, financial institutions, and large enterprises building private AI nodes. As AI rack density continues to rise, the limitations of traditional air-cooled facilities are becoming more visible, which makes prefabricated liquid-cooled pods increasingly attractive for faster deployment, lower energy intensity, and better site adaptability.

The competitive landscape is becoming more hybrid and more technically demanding. Data center infrastructure companies are extending into AI liquid cooling modules, liquid cooling specialists are moving from components toward integrated pod systems, and server vendors, telecom equipment suppliers, and modular data center companies are entering high-density intelligent computing projects. Product boundaries are still evolving. Direct-to-chip liquid cooling is more aligned with mainstream GPU platforms and high-density AI racks, while immersion cooling is more differentiated in edge AI, extremely high thermal density, and harsh deployment environments. Recent product launches, project validations, partnerships, acquisitions, and prefabrication capacity expansion show that suppliers are trying to close capability gaps across cooling, container structure, power systems, and field delivery. Competition will increasingly shift from thermal performance alone to whole-pod reliability, platform compatibility, manufacturing repeatability, global service coverage, and measurable energy efficiency.

Policy pressure and capital spending are reinforcing the sector's growth path. Stricter requirements on data center energy use, carbon emissions, water consumption, and grid connection are pushing new builds and retrofit projects toward liquid cooling and modular deployment. At the same time, AI infrastructure investment is expanding beyond large centralized campuses into regional, edge, and overseas rapid deployment

scenarios, allowing containerized liquid-cooled pods to move from pilot projects to repeatable commercial deployment. The long-term outlook is positive, but growth will still be constrained by power availability, liquid cooling operation experience, customer budget cycles, GPU platform changes, and the lack of fully unified product standards. Companies with integrated pod design, liquid cooling engineering, prefabricated manufacturing, global delivery, and lifecycle operation capabilities are likely to capture stronger pricing power, while component-only suppliers and simple project integrators may face increasing pressure from system-level manufacturers.

This report is a detailed and comprehensive analysis for global Containerized Liquid-Cooled AI Server Pods 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 Containerized Liquid-Cooled AI Server Pods market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Containerized Liquid-Cooled AI Server Pods market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Containerized Liquid-Cooled AI Server Pods market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Containerized Liquid-Cooled AI Server Pods market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K US\$/Unit), 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 Containerized Liquid-Cooled AI Server Pods

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 Containerized Liquid-Cooled AI Server Pods 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, Hewlett Packard Enterprise Company, Delta Electronics, Inc., STULZ GmbH, ZTE Corporation, Kehua Data Co., Ltd., CIMC Digital Power, Inspur Electronic Information Industry Co., Ltd., Shenzhen Lianli Liquid Cooling Equipment Technology Co., Ltd., etc.

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

Market Segmentation

Containerized Liquid-Cooled AI Server Pods 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

20-foot Standard Container Pod

40-foot Standard Container Pod

Customized Modular Pod

Others

Market segment by Cooling Architecture

Direct-to-chip Cold Plate Cooling

Hybrid Air-liquid Cooling

Immersion Liquid Cooling

Others

Market segment by IT Load Capacity

Small Edge Class Less than 250 kW

Medium Class 250 to 500 kW

High-density Class 500 kW to 1 MW

MW-scale Class 1 to 3 MW

Large Cluster Class More than 3 MW

Others

Market segment by Application

Cloud and Internet Services

Telecom Operators

Research

Financial Services

Others

Major players covered

Vertiv Holdings Co

Schneider Electric SE

Hewlett Packard Enterprise Company

Delta Electronics, Inc.

STULZ GmbH

ZTE Corporation

Kehua Data Co., Ltd.

CIMC Digital Power

Inspur Electronic Information Industry Co., Ltd.

Shenzhen Lianli Liquid Cooling Equipment Technology Co., Ltd.

Hon Flex

LiquidStack

Green Revolution Cooling, Inc.

Submer Technologies

DUG Technology Ltd

2CRSi SA

Fourier Cooling Solutions

Guangdong Kortrong New Energy Industry Group Co., Ltd.

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 Containerized Liquid-Cooled AI Server Pods product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Containerized Liquid-Cooled AI Server Pods, with price, sales quantity, revenue, and global market share of Containerized Liquid-Cooled AI Server Pods from 2021 to 2026.

Chapter 3, the Containerized Liquid-Cooled AI Server Pods competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Containerized Liquid-Cooled AI Server Pods 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 Containerized Liquid-Cooled AI Server Pods 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 Containerized Liquid-Cooled AI Server Pods.

Chapter 14 and 15, to describe Containerized Liquid-Cooled AI Server Pods sales channel, distributors, customers, research findings and conclusion.

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