

Global Containerized Liquid-Cooled AI Server Pods Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Containerized Liquid-Cooled AI Server Pods market size is expected to reach \$ 4280 million by 2032, rising at a market growth of 18.1% CAGR during the forecast period (2026-2032).

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 studies the global Containerized Liquid-Cooled AI Server Pods production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Containerized Liquid-Cooled AI Server Pods 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 Containerized Liquid-Cooled AI Server Pods that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Containerized Liquid-Cooled AI Server Pods total production and demand, 2021-2032, (Units)

Global Containerized Liquid-Cooled AI Server Pods total production value, 2021-2032, (USD Million)

Global Containerized Liquid-Cooled AI Server Pods production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Containerized Liquid-Cooled AI Server Pods consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Containerized Liquid-Cooled AI Server Pods domestic production, consumption, key domestic manufacturers and share

Global Containerized Liquid-Cooled AI Server Pods production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Containerized Liquid-Cooled AI Server Pods production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Containerized Liquid-Cooled AI Server Pods production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Containerized Liquid-Cooled AI Server Pods 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, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Containerized Liquid-Cooled AI Server Pods market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K 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 Containerized Liquid-Cooled AI Server Pods Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Containerized Liquid-Cooled AI Server Pods Market, Segmentation by Type:

20-foot Standard Container Pod

40-foot Standard Container Pod

Customized Modular Pod

Others

Global Containerized Liquid-Cooled AI Server Pods Market, Segmentation by Cooling Architecture:

Direct-to-chip Cold Plate Cooling

Hybrid Air-liquid Cooling

Immersion Liquid Cooling

Others

Global Containerized Liquid-Cooled AI Server Pods Market, Segmentation 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

Global Containerized Liquid-Cooled AI Server Pods Market, Segmentation by Application:

Cloud and Internet Services

Telecom Operators

Research

Financial Services

Others

Companies Profiled:

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.

Key Questions Answered:

1. How big is the global Containerized Liquid-Cooled AI Server Pods market?
2. What is the demand of the global Containerized Liquid-Cooled AI Server Pods market?
3. What is the year over year growth of the global Containerized Liquid-Cooled AI Server Pods market?
4. What is the production and production value of the global Containerized Liquid-Cooled AI Server Pods market?
5. Who are the key producers in the global Containerized Liquid-Cooled AI Server Pods market?
6. What are the growth factors driving the market demand?

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