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

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Abstracts

According to our (Global Info Research) latest study, the global Data Center Liquid Cooling Piping Components market size was valued at US$ 2869 million in 2025 and is forecast to a readjusted size of US$ 7054 million by 2032 with a CAGR of 13.7% during review period.

Data Center Liquid Cooling Piping Components refer to critical fluid management components used in liquid cooling systems for modern data centers, enabling coolant circulation, distribution, connection, and flow control between servers, racks, cooling distribution units (CDUs), heat exchangers, and external cooling infrastructure. The product scope covers liquid cooling hoses, rigid piping, quick connectors, manifolds, valves, couplings, and sealing components designed for high-density computing environments. These components support efficient heat transfer from high-performance processors and AI accelerators by providing reliable liquid flow channels with requirements for high pressure resistance, low leakage, thermal stability, corrosion resistance, and long-term operational reliability. The market mainly serves AI data centers, cloud computing facilities, hyperscale data centers, enterprise computing infrastructure, and edge computing environments adopting cold plate, rack-level, and immersion liquid cooling architectures.

Key Findings

Data center liquid cooling piping components are mainly driven by AI server and high-density computing infrastructure deployment

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Quick connectors and liquid cooling manifolds represent core components in advanced liquid cooling systems

Cold plate liquid cooling remains the dominant architecture for commercial AI data center deployment

North America leads high-performance computing liquid cooling adoption with strong hyperscale data center demand

Leading suppliers compete through fluid reliability, customization capability, and thermal management expertise

Market Trends

The data center liquid cooling piping components market is evolving rapidly as increasing AI workloads, GPU clusters, and high-performance computing systems push rack power density beyond the limitations of traditional air cooling. Future product development is focused on higher flow rates, improved pressure tolerance, enhanced sealing technologies, reduced installation complexity, and standardized modular designs. Quick disconnect technologies, advanced manifolds, and integrated rack-level liquid distribution solutions are becoming increasingly important as operators seek scalable cooling architectures for AI infrastructure. Manufacturers are also improving material compatibility, contamination control, and lifecycle reliability to meet the requirements of next-generation data centers.

Market Dynamics

Drivers

The primary growth drivers include rapid expansion of AI computing infrastructure, increasing deployment of GPU-based servers, rising rack power density, and global demand for energy-efficient data centers. Liquid cooling enables significantly improved thermal management compared with conventional air cooling and is increasingly adopted by cloud service providers, internet companies, and enterprise operators. The transition toward direct-to-chip cooling and rack-level liquid cooling architectures is creating sustained demand for specialized piping components, quick connectors, and coolant distribution solutions.

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Restraints

Market development is constrained by the complexity of liquid cooling system integration, higher initial infrastructure investment, strict requirements for leakage prevention, and the need for specialized installation and maintenance capabilities. Data center operators must also address coolant compatibility, reliability verification, and long-term operational risks before large-scale deployment, which may slow adoption in traditional facilities.

Opportunities

Major opportunities arise from the rapid growth of AI data centers, expansion of hyperscale computing facilities, and increasing adoption of liquid cooling in enterprise and edge computing environments. Suppliers with capabilities in precision fluid control, customized manifold design, high-performance connectors, and integrated cooling solutions are positioned to benefit from future market expansion. Standardization of liquid cooling interfaces and growing demand for modular rack solutions will further create opportunities for component manufacturers.

Challenges

The industry faces challenges related to technology standardization, supply chain coordination, reliability certification, and competition between different liquid cooling architectures. Component suppliers need to maintain extremely low leakage rates, high durability, and compatibility with evolving server designs. Rapid changes in AI hardware platforms also require continuous product adaptation and engineering investment.Industry Chain Analysis

The data center liquid cooling piping components industry chain consists of upstream materials, midstream component manufacturing, and downstream data center applications. The upstream sector includes stainless steel, copper alloys, polymers, sealing materials, precision machining equipment, and surface treatment technologies that determine corrosion resistance, mechanical strength, and reliability. The midstream sector includes manufacturers producing liquid cooling hoses, quick connectors, manifolds, valves, and integrated fluid distribution components. The downstream sector covers hyperscale data centers, cloud service providers, telecommunications operators,

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government computing facilities, healthcare computing infrastructure, and AI computing centers. Value creation mainly comes from precision manufacturing capability, fluid reliability engineering, customization services, and integration with advanced liquid cooling architectures.

Segment Insights

By product type, quick connectors, liquid cooling manifolds, and hoses represent the most important segments because they directly influence coolant circulation efficiency, maintenance convenience, and system reliability. Quick connectors are increasingly valued in rack-level and direct liquid cooling systems due to their ability to simplify server replacement and reduce maintenance downtime. Liquid cooling manifolds are becoming strategically important as AI racks require more complex coolant distribution structures. By cooling structure, cold plate liquid cooling currently represents the largest commercial segment, while rack-level liquid cooling and immersion liquid cooling are gaining attention for future high-density AI computing applications. The market structure is shifting toward higher-value customized components rather than standardized low-cost piping products.

Downstream Market Opportunities

The major downstream opportunities are concentrated in AI data centers, cloud computing infrastructure, telecommunications facilities, enterprise data centers, and specialized computing environments. AI training and inference workloads require increasingly powerful accelerators, creating demand for advanced liquid cooling solutions capable of supporting higher thermal loads. Cloud providers and large-scale data center operators are accelerating adoption of liquid cooling technologies to improve energy efficiency, reduce operating costs, and support next-generation computing platforms. Emerging applications in edge computing and industry-specific data centers will provide additional growth opportunities.

Regional Insights

North America represents one of the most advanced markets for data center liquid cooling piping components due to strong demand from hyperscale cloud providers, AI infrastructure developers, and high-performance computing operators. The region has established liquid cooling ecosystems covering component suppliers, system

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integrators, and data center operators. Asia Pacific is becoming a major growth region driven by AI infrastructure investment, semiconductor ecosystem expansion, and increasing construction of large-scale data centers. China, Japan, South Korea, and Taiwan are strengthening their positions through local manufacturing capabilities in precision connectors, thermal management components, and cooling systems. Europe is also expanding adoption as data center operators focus on energy efficiency and sustainability requirements.

Competitive Landscape Analysis

The competitive landscape is characterized by a combination of global fluid control specialists, thermal management companies, and regional precision component manufacturers. International companies such as Nitto Kohki, Stäubli, Danfoss, Parker Hannifin, Gates, Swagelok, and Boyd Corporation compete through advanced fluid connection technologies, reliability certification, and global customer networks. Data center infrastructure companies such as Vertiv and nVent participate through integrated cooling system solutions. Asian suppliers including Auras, Envicool, Tongfei, Jonhon Optronic Technology, Goaland, FRD, and other precision component manufacturers are strengthening competitiveness through localized production, customized solutions, and close cooperation with AI server ecosystem companies. Future competition will focus on connector standardization, liquid distribution efficiency, manufacturing precision, and integrated thermal management capability.

Report Scope

This report is a detailed and comprehensive analysis for global Data Center 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 Data Center Liquid Cooling Piping Components market size and forecasts, in

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consumption value ($ Million), 2021-2032

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

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

Global Data Center 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 Data Center 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 Data Center 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 Nitto Kohki, Stäubli, Vertiv, nVent, Danfoss, Parker Hannifin, Gates, Boyd Corporation, Colder Products Company, Swagelok, etc.

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

Data Center 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.

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Market segmentation

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

Internet

Telecommunications

Government

Healthcare

Other

Market segment by players, this report covers

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Nitto Kohki

Stäubli

Vertiv

nVent

Danfoss

Parker Hannifin

Gates

Boyd Corporation

Colder Products Company

Swagelok

Auras

Jonhon Optronic Technology Co., Ltd.

Tongfei Co., Ltd.

Remindore Technology

Envicool Technology Co., Ltd.

Yimikang Tech. Group Co., Ltd.

Zhongding Group

Guangzhou Goaland Energy Conservation Tech. Co., Ltd

Shenzhen FRD Science & Technology Co., Ltd.

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Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

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

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 Data Center Liquid Cooling Piping Components product scope, market overview, market estimation caveats and base year.
Chapter 2, to profile the top players of Data Center Liquid Cooling Piping Components, with revenue, gross margin, and global market share of Data Center Liquid Cooling Piping Components from 2021 to 2026.
Chapter 3, the Data Center 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 Data Center 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 Data Center Liquid Cooling Piping Components.
Chapter 13, to describe Data Center Liquid Cooling Piping Components research findings and conclusion.

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