

Global Direct-to-Chip Liquid Cold Plates for AI Servers Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Direct-to-Chip Liquid Cold Plates for AI Servers market size was valued at US\$ 524 million in 2025 and is forecast to a readjusted size of US\$ 2787 million by 2032 with a CAGR of 21.7% during review period.

In 2025, global sales of direct-to-chip liquid cold plates for AI servers are estimated at approximately 2.91 million units, with an average selling price of about USD 175 per unit, corresponding to a market size of approximately USD 509.4 million. Direct-to-chip liquid cold plates for AI servers are chip-level liquid heat exchange components mounted directly on CPUs, GPUs, AI accelerators, memory modules, or other high-power board-level heat sources inside AI servers. These products are typically made of copper, aluminum, stainless steel, or composite metal structures, with internal cooling channels formed through machining, stamping, microchannel design, embedded tube structures, brazing, diffusion bonding, or additive manufacturing. By circulating coolant through the cold plate, they remove heat directly from high-power chips or board-level devices, enabling high-heat-flux cooling, chip temperature control, higher server power density, and reliable operation in AI training servers, AI inference servers, high-density GPU servers, AI accelerated computing servers, and high-power data center computing nodes.

Demand growth is mainly driven by three factors. First, rising shipments of AI training and inference servers are increasing demand for GPU cold plates, AI accelerator cold plates, and processor cold plates. Second, higher rack power density is pushing liquid cooling from an optional configuration toward a necessary solution for high-power AI clusters. Third, the adoption of GB200, GB300, and next-generation high-power AI

computing platforms is increasing both the number of cold plates per server and the complexity of cold plate design. In the short term, the market will remain largely driven by customized projects from leading cloud service providers, server OEMs, and AI infrastructure customers. Product pricing will be influenced by structural complexity, material selection, flow channel design, sealing reliability, and customer qualification requirements. Over the medium to long term, as liquid-cooled server platforms become more standardized and Asian manufacturing supply chains mature, average selling prices are expected to decline, while volume growth and a higher share of advanced cold plates will continue to support market expansion.

From a competitive perspective, global suppliers are mainly concentrated in North America, Taiwan, Mainland China, Japan, and Europe. Companies such as CoolIT, Boyd, JetCool, Delta, Cooler Master, Nidec, Fujikura, Wieland, Asetek, Fabric8Labs, Envicool, FRD, Lingyi iTech, and Goaland have established visible product or business positions. Future competition will depend not only on cold plate manufacturing capability, but also on thermal resistance control, flow resistance design, microchannel structures, sealing reliability, material compatibility, batch-to-batch consistency, fast customization, and co-design capabilities with CDUs, manifolds, quick disconnects, and server platforms. Overall, direct-to-chip liquid cold plates for AI servers represent a high-value and strategically important component segment within the AI data center thermal management supply chain, with strong demand visibility, high customer qualification barriers, and clear opportunities linked to liquid cooling penetration, cold plate count per server, and supplier mass-production capability.

This report is a detailed and comprehensive analysis for global Direct-to-Chip Liquid Cold Plates for AI Servers 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 Direct-to-Chip Liquid Cold Plates for AI Servers market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Direct-to-Chip Liquid Cold Plates for AI Servers market size and forecasts by

Global Direct-to-Chip Liquid Cold Plates for AI Servers Market 2026 by Manufacturers, Regions, Type and Applic...

region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Direct-to-Chip Liquid Cold Plates for AI Servers market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Direct-to-Chip Liquid Cold Plates for AI Servers market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (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 Direct-to-Chip Liquid Cold Plates for AI Servers

- 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 Direct-to-Chip Liquid Cold Plates for AI Servers 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 Ecolab Inc., Eaton Corporation plc, Flex Ltd., Advanced Thermal Solutions Inc., Advanced Cooling Technologies Inc., ZutaCore Inc., Delta Electronics, Inc., Cooler Master Technology Inc., Asia Vital Components Co., Ltd., Auras Technology Co., Ltd., etc.

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

Market Segmentation

Direct-to-Chip Liquid Cold Plates for AI Servers 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

Processor Cold Plates

AI Accelerator Cold Plates

Memory Module Cold Plates

Board-Level Component Cold Plates

Other

Market segment by Heat Transfer Route

Single-Phase Liquid Cold Plates

Two-Phase Liquid Cold Plates

Other

Market segment by Manufacturing Technology

Machined Cold Plates

Stamped Cold Plates

Microchannel Cold Plates

Additively Manufactured Cold Plates

Other

Market segment by Application

AI Training

AI Inference

AI Fine-Tuning

AI High-Density Computing

Other

Major players covered

Ecolab Inc.

Eaton Corporation plc

Flex Ltd.

Advanced Thermal Solutions Inc.

Advanced Cooling Technologies Inc.

ZutaCore Inc.

Delta Electronics, Inc.

Cooler Master Technology Inc.

Asia Vital Components Co., Ltd.

Auras Technology Co., Ltd.

Nidec Corporation

Fujikura Ltd.

Wieland-Werke AG

Asetek A/S

Fabric8Labs Inc.

Envicool Technology Co., Ltd.

Shenzhen FRD Science and Technology Co., Ltd.

Guangdong Lingyi iTech Manufacturing Co., Ltd.

Guangzhou Goaland Energy Conservation Tech Co., Ltd.

Shenzhen Lori Technology 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 Direct-to-Chip Liquid Cold Plates for AI Servers product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Direct-to-Chip Liquid Cold Plates for AI Servers, with price, sales quantity, revenue, and global market share of Direct-to-Chip Liquid Cold Plates for AI Servers from 2021 to 2026.

Chapter 3, the Direct-to-Chip Liquid Cold Plates for AI Servers competitive situation,

sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Direct-to-Chip Liquid Cold Plates for AI Servers 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 Direct-to-Chip Liquid Cold Plates for AI Servers 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 Direct-to-Chip Liquid Cold Plates for AI Servers.

Chapter 14 and 15, to describe Direct-to-Chip Liquid Cold Plates for AI Servers sales channel, distributors, customers, research findings and conclusion.

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