

Global Direct-to-Chip Liquid Cold Plates for AI Servers Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Direct-to-Chip Liquid Cold Plates for AI Servers market size is expected to reach \$ 2787 million by 2032, rising at a market growth of 21.7% CAGR during the forecast period (2026-2032).

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 studies the global Direct-to-Chip Liquid Cold Plates for AI Servers production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Direct-to-Chip Liquid Cold Plates for AI Servers 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 Direct-to-Chip Liquid Cold Plates for AI Servers that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Direct-to-Chip Liquid Cold Plates for AI Servers total production and demand, 2021-2032, (K Units)

Global Direct-to-Chip Liquid Cold Plates for AI Servers total production value, 2021-2032, (USD Million)

Global Direct-to-Chip Liquid Cold Plates for AI Servers production by region & country,

production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Direct-to-Chip Liquid Cold Plates for AI Servers consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Direct-to-Chip Liquid Cold Plates for AI Servers domestic production, consumption, key domestic manufacturers and share

Global Direct-to-Chip Liquid Cold Plates for AI Servers production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Direct-to-Chip Liquid Cold Plates for AI Servers production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Direct-to-Chip Liquid Cold Plates for AI Servers production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

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, production, value, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Direct-to-Chip Liquid Cold Plates for AI Servers market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (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 Direct-to-Chip Liquid Cold Plates for AI Servers Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Direct-to-Chip Liquid Cold Plates for AI Servers Market, Segmentation by Type:

Processor Cold Plates

AI Accelerator Cold Plates

Memory Module Cold Plates

Board-Level Component Cold Plates

Other

Global Direct-to-Chip Liquid Cold Plates for AI Servers Market, Segmentation by Heat Transfer Route:

Single-Phase Liquid Cold Plates

Two-Phase Liquid Cold Plates

Other

Global Direct-to-Chip Liquid Cold Plates for AI Servers Market, Segmentation by

Global Direct-to-Chip Liquid Cold Plates for AI Servers Supply, Demand and Key Producers, 2026-2032

Manufacturing Technology:

Machined Cold Plates

Stamped Cold Plates

Microchannel Cold Plates

Additively Manufactured Cold Plates

Other

Global Direct-to-Chip Liquid Cold Plates for AI Servers Market, Segmentation by Application:

AI Training

AI Inference

AI Fine-Tuning

AI High-Density Computing

Other

Companies Profiled:

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.

Key Questions Answered:

1. How big is the global Direct-to-Chip Liquid Cold Plates for AI Servers market?
2. What is the demand of the global Direct-to-Chip Liquid Cold Plates for AI Servers market?
3. What is the year over year growth of the global Direct-to-Chip Liquid Cold Plates for AI Servers market?
4. What is the production and production value of the global Direct-to-Chip Liquid Cold Plates for AI Servers market?

5. Who are the key producers in the global Direct-to-Chip Liquid Cold Plates for AI Servers market?
6. What are the growth factors driving the market demand?

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Figure 75. Research Process and Data Source

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