

Global Full Liquid Cooling Plate System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Full Liquid Cooling Plate System market size is expected to reach \$ 4871 million by 2032, rising at a market growth of 27.9% CAGR during the forecast period (2026-2032).

Full Liquid Cooling Plate Systems use cold plates and sealed liquid loops to cool CPUs, GPUs, memory, networking chips, power modules, and other major heat-generating components inside servers, allowing most or nearly all system heat to be removed by liquid. A complete system generally includes multi-component cold plates, internal server tubing, quick disconnects, rack manifolds, coolant distribution units, heat exchangers, filtration and refill devices, leak detection, and intelligent controls. Major applications include artificial intelligence, high-performance computing, cloud data centers, and scientific computing environments with extremely high power density. Key upstream inputs include copper or aluminum cold plates, microchannel components, pumps, valves, heat exchangers, sensors, quick disconnects, seals, and coolants, while major downstream customers include data center operators, cloud and AI computing providers, HPC and research institutions, and telecom and enterprise customers. On a standardized fully liquid-cooled rack-equivalent basis, global effective annual production capacity was approximately 5,600 systems in 2025, sales reached about 4,370 systems, the average ex-factory price was approximately USD 187,600 per system, and the estimated industry gross margin was approximately 27%-40%.

The global Full Liquid Cooling Plate System market is expanding from customized high-performance computing technology into AI infrastructure and high-density cloud data centers. As the power consumption of GPUs, AI accelerators, memory, and networking components increases simultaneously, cooling only CPUs and GPUs is becoming insufficient for managing total rack heat. Full liquid cooling extends coverage to

memory, power supplies, networking chips, and voltage regulation modules, significantly reducing residual air-cooling demand and enabling higher server and rack power density. Current adoption remains concentrated in large AI clusters, supercomputing centers, and leading cloud service providers, while deployment in conventional enterprise data centers remains limited.

Technology is shifting from localized processor cooling toward coordinated liquid cooling of multiple server components. Cooling coverage, component compatibility, and system-level flow control are becoming important performance indicators. As the number of cold plates inside each server increases, pressure drop, flow balance, material compatibility, and leakage prevention become more complex, encouraging integrated design across cold plates, manifolds, quick disconnects, coolant distribution units, and control software. Single-phase water-based cooling remains the dominant architecture, while pumped two-phase technology is gradually being validated for higher heat-flux applications. Future competition will move beyond individual cold plate performance toward end-to-end coordination from the server to the rack and facility.

Market growth is being driven by the expansion of AI training and inference clusters, rising rack power density, stricter data center energy-efficiency requirements, and increased investment in high-performance computing. Full-system liquid cooling can reduce demand for server fans and room-level air cooling, lower the space occupied by cooling equipment, and improve the feasibility of heat reuse. As server manufacturers integrate cold plates and liquid loops during product design and data centers install facility-water systems during construction, deployment and integration complexity is expected to decline. Further standardization of interfaces, coolant parameters, and monitoring protocols will also support the transition from customized projects to scalable delivery.

The industry still faces constraints related to high initial investment, differences among server platforms, changing maintenance procedures, and inconsistent technical standards. Compared with conventional cold plate cooling, full liquid cooling involves more cold plates, tubing, and connection points, placing higher requirements on leakage control, flow distribution, and online maintenance. Liquid cooling designs for power supplies, storage devices, and optical components are also not yet fully standardized. Existing data centers frequently lack facility-water networks, resulting in high retrofit costs and engineering complexity. Future expansion will depend on greater availability of fully liquid-cooled servers, standardized interfaces, proven long-term reliability, and stronger lifecycle economics compared with conventional air cooling and partial liquid cooling alternatives.

This report studies the global Full Liquid Cooling Plate System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Full Liquid Cooling Plate System 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 Full Liquid Cooling Plate System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Full Liquid Cooling Plate System total production and demand, 2021-2032, (Units)

Global Full Liquid Cooling Plate System total production value, 2021-2032, (USD Million)

Global Full Liquid Cooling Plate System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Full Liquid Cooling Plate System consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Full Liquid Cooling Plate System domestic production, consumption, key domestic manufacturers and share

Global Full Liquid Cooling Plate System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Full Liquid Cooling Plate System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Full Liquid Cooling Plate System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Full Liquid Cooling Plate System 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 Lenovo, Supermicro, Hewlett Packard Enterprise, Dell Technologies, Eviden, Schneider Electric, Vertiv, CoolIT Systems, Eaton, nVent, 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 Full Liquid Cooling Plate System 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 Full Liquid Cooling Plate System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Full Liquid Cooling Plate System Market, Segmentation by Type:

Single-phase Cold Plate Cooling

Pumped Two-phase Cold Plate Cooling

Global Full Liquid Cooling Plate System Market, Segmentation by System Configuration:

Server-level Systems

Rack-level Systems

Row-level Systems

Other

Global Full Liquid Cooling Plate System Market, Segmentation by Cooling Capacity:

Below 100 kW

100?499 kW

500?999 kW

1 MW and Above

Global Full Liquid Cooling Plate System Market, Segmentation by Application:

Data Center Operators

Cloud and AI Computing Providers

HPC and Research Institutions

Other

Companies Profiled:

Lenovo

Supermicro

Hewlett Packard Enterprise

Dell Technologies

Eviden

Schneider Electric

Vertiv

CoolIT Systems

Eaton

nVent

Delta Electronics

Envicool

Inspur

Sugon Data Energy

Key Questions Answered:

1. How big is the global Full Liquid Cooling Plate System market?
2. What is the demand of the global Full Liquid Cooling Plate System market?
3. What is the year over year growth of the global Full Liquid Cooling Plate System market?
4. What is the production and production value of the global Full Liquid Cooling Plate System market?
5. Who are the key producers in the global Full Liquid Cooling Plate System market?
6. What are the growth factors driving the market demand?

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