

Global Liquid Cooling Machine Tools Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G333724514D5EN.html>

Date: September 2026

Pages: 134

Price: US\$ 4,480.00 (Single User License)

ID: G333724514D5EN

Abstracts

The global Liquid Cooling Machine Tools market size is expected to reach \$ 2577 million by 2032, rising at a market growth of 9.8% CAGR during the forecast period (2026-2032).

Liquid Cooling Machine Tools refer to the comprehensive category of high-precision metal-cutting machine tools specifically engineered for the manufacturing of core metallic components used in liquid cooling thermal management systems. The core manufacturing process revolves around precision CNC machining, encompassing milling, drilling, and turning operations performed on materials such as copper, aluminum, and stainless steel to produce critical components including cold plates, quick disconnect couplings (UQD), manifolds, distributors, and valve bodies. These machine tools are required to deliver micron-level machining accuracy, ensuring the single-pass formation of complex flow channels and sealing surfaces, while simultaneously maintaining high rigidity and efficiency for thin-wall workpiece processing. The equipment category primarily includes Vertical Machining Centers (VMC) and Horizontal Machining Centers (HMC), with manufacturing approaches spanning subtractive manufacturing as the dominant technology and additive manufacturing emerging as a complementary process route. This product category has emerged as a specialized precision manufacturing equipment segment driven by the high-power thermal dissipation requirements of AI computing infrastructure.

Key Findings

Global liquid cooling machine tools production reached approximately 32,000 units in 2025

The average global market price for liquid cooling machine tools stood at US\$40,000 per unit in 2025

Global production capacity for liquid cooling machine tools totaled 40,000 units in 2025

The industry achieved an average gross margin of 38% in 2025

Asia-Pacific represents the largest regional market, driven by concentrated AI infrastructure investment

Market Trends

The liquid cooling machine tools industry is undergoing a significant transformation driven by the explosive growth of AI computing power and the corresponding surge in high-density thermal management requirements. Machine tool manufacturers are increasingly developing dedicated machining solutions tailored specifically for liquid cooling component production, with Mazak's MTF2026 exhibition showcasing dedicated machining solutions for AI liquid cooling connectors, semiconductor vacuum chambers, and humanoid robot components. The industry is witnessing a shift toward integrated multi-tasking machines capable of completing turning, drilling, milling, and tapping operations in a single setup, eliminating positioning errors caused by multiple clampings. High-speed and high-rigidity vertical machining centers are being deployed for complex liquid-cooling connector cavity machining, with optional 5-axis rotary tables enabling the processing of complex curved surfaces. The trend toward automated, unmanned production is accelerating, with manufacturers incorporating robotics and flexible manufacturing systems to meet the industry's requirements for high product variety and rapid iteration cycles.

Market Dynamics

Drivers

The primary growth driver for the liquid cooling machine tools market is the relentless expansion of AI data center infrastructure and the corresponding escalation in power density per server rack. As AI server single-rack power consumption continues to rise,

the imperative for liquid cooling solutions has intensified, driving demand for precision-machined components including cold plates, manifolds, pumps, and quick disconnect couplings. The liquid cooling components market in China alone reached RMB 15.98 billion in 2025, representing 45.2% year-on-year growth. Machine tool orders in liquid cooling applications have surged, with industry reports indicating that demand for high-speed tapping centers and vertical machining centers for the production of liquid-cooled core structural components remains at elevated levels. The low penetration rate of liquid cooling-specific machine tools relative to total industry demand—estimated at less than 2% in 2025 with projections exceeding 10% in 2026—signals substantial runway for continued growth.

Restraints

The industry faces several constraints that temper growth. The supply chain for critical components such as ball screws and linear guides remains heavily dependent on Japanese imports, with delivery lead times extending to three months, constraining short-term production capacity and cost structures. The high precision requirements for liquid cooling components demand advanced machine tool capabilities that are not yet universally available across all manufacturing regions. The relatively nascent stage of the liquid cooling market means that equipment demand remains subject to the capacity planning cycles of downstream server manufacturers and the commercialization timelines of liquid cooling solutions. Additionally, the specialization required for liquid cooling component manufacturing creates a barrier to entry for general-purpose machine tool manufacturers without dedicated R&D investment in this application area.

Opportunities

Significant opportunities exist for machine tool manufacturers that can develop dedicated, application-specific solutions for liquid cooling component production. The emergence of new component geometries—including eccentric holes, side details, and corner structures in liquid-cooling connectors—creates demand for specialized machining capabilities that traditional lathes cannot address. The compound annual growth rate of 49% projected for AI server liquid cooling-related revenue at certain precision machine tool manufacturers through fiscal 2026-2029 underscores the growth potential. Opportunities also exist in the development of hybrid manufacturing approaches combining subtractive and additive manufacturing techniques, as well as in the integration of automation and robotics for high-volume production. The semiconductor equipment and humanoid robotics sectors represent adjacent markets with similar precision machining requirements.

Challenges

The liquid cooling machine tools industry faces notable risks and challenges. Rapid technological evolution in both liquid cooling system design and machining processes requires continuous R&D investment and frequent product updates, creating obsolescence risk for existing equipment. The concentration of advanced machine tool manufacturing capabilities in certain geography regions—particularly Japan and Germany—creates supply chain vulnerabilities. Intensifying competition among machine tool manufacturers entering the liquid cooling space may pressure pricing and margins despite the current industry-average gross margin of 38%. The cyclical nature of capital equipment investment means that any slowdown in AI infrastructure spending could disproportionately impact this specialized segment. Additionally, the need for specialized training and technical support for end users adds to the total cost of ownership and may slow adoption rates among smaller manufacturers.

Industry Chain Analysis

The liquid cooling machine tools industry chain consists of three distinct tiers. The upstream segment encompasses raw material suppliers providing high-grade cast iron, steel, and aluminum for machine tool structures, as well as manufacturers of critical components including spindles, linear guides, ball screws, CNC controllers, and servo motors. The midstream segment consists of the machine tool manufacturers—the primary subject of this report—who integrate these components into complete machining centers specifically configured for liquid cooling production. Key players in this segment include global component leaders such as Yamazaki Mazak, DMG MORI, Haas Automation, Okuma, and Tsugami, alongside Chinese manufacturers including Guangzhou Haozhi Industrial, Jirfine Intelligent Equipment, and General Technology Group. The downstream segment encompasses end users in the liquid cooling component manufacturing industry, including producers of cold plates, quick connectors, manifolds, distributors, and valve bodies, who ultimately supply to data center operators, server manufacturers, and thermal management solution providers. Value creation within this chain is concentrated in the midstream segment, where machine tool manufacturers capture value through precision engineering, application-specific customization, and after-sales service and support.

Report Scope

This report studies the global Liquid Cooling Machine Tools production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Liquid Cooling Machine Tools total production and demand, 2021-2032, (K Units)

Global Liquid Cooling Machine Tools total production value, 2021-2032, (USD Million)

Global Liquid Cooling Machine Tools production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Liquid Cooling Machine Tools consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Liquid Cooling Machine Tools domestic production, consumption, key domestic manufacturers and share

Global Liquid Cooling Machine Tools production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Liquid Cooling Machine Tools production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Liquid Cooling Machine Tools production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Liquid Cooling Machine Tools 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 Guangzhou Haozhi Industrial Co.,Ltd, Jirfine Intelligent Equipment Co.,Ltd, China General Technology (Group) Holding Co., Ltd., Haas Automation?, Mazak USA?, DMG MORI USA?, Okuma America?, Tsugami Corporation, Star Micronics, Yamazaki Mazak, 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 Liquid Cooling Machine Tools 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 Liquid Cooling Machine Tools Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Liquid Cooling Machine Tools Market, Segmentation by Type:

Vertical Machining Center

Horizontal Machining Center

Global Liquid Cooling Machine Tools Market, Segmentation by Technical Approaches:

Subtractive Manufacturing

Additive Manufacturing

Global Liquid Cooling Machine Tools Market, Segmentation by Application:

Liquid Cooling Plate

Distributor

Quick Connector

Manifold

Valve Body

Others

Companies Profiled:

Guangzhou Haozhi Industrial Co.,Ltd

Jirfine Intelligent Equipment Co.,Ltd

China General Technology (Group) Holding Co., Ltd.

Haas Automation?

Mazak USA?

DMG MORI USA?

Okuma America?

Tsugami Corporation

Star Micronics

Yamazaki Mazak

EMCO

SW GmbH

Key Questions Answered

1. How big is the global Liquid Cooling Machine Tools market?
2. What is the demand of the global Liquid Cooling Machine Tools market?
3. What is the year over year growth of the global Liquid Cooling Machine Tools market?
4. What is the total value of the global Liquid Cooling Machine Tools market?
5. Who are the Major Players in the global Liquid Cooling Machine Tools market?
6. What are the growth factors driving the market demand?

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