

Global Non-contact Liquid Cooling System 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 Non-contact Liquid Cooling System market size was valued at US\$ 3241 million in 2025 and is forecast to a readjusted size of US\$ 15196 million by 2032 with a CAGR of 24.2% during review period.

Non-contact Liquid Cooling Systems transfer heat from CPUs, GPUs, and other high-power components through metal cold plates containing circulating coolant. The coolant does not come into direct contact with chips, circuit boards, or other electronic components. A complete system generally includes cold plates, hoses, quick disconnects, rack manifolds, coolant distribution units, heat exchangers, pumps, valves, filtration and refill devices, leak detection, and control systems. Major applications include artificial intelligence, high-performance computing, cloud data centers, colocation facilities, and telecom edge computing. 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 rack-equivalent system basis, global effective annual production capacity reached approximately 31,800 systems in 2025, sales totaled about 24,760 systems, the average ex-factory price was approximately USD 127,200 per system, and the estimated industry gross margin was approximately 25%?38%.

The global Non-contact Liquid Cooling System market is expanding rapidly from specialized high-performance computing applications into AI and mainstream data center infrastructure. As the power consumption of GPUs, AI accelerators, and high-

performance processors continues to increase, conventional air cooling faces clear limitations in heat-removal capacity, energy efficiency, and space utilization within high-density racks. Cold plate cooling removes heat directly from major thermal sources while preserving familiar server structures and maintenance practices, making it one of the most widely adopted liquid cooling architectures for AI data centers. Current demand is concentrated in new AI computing centers, hyperscale cloud facilities, and HPC clusters, while existing data centers generally adopt liquid-to-air CDUs or hybrid air-liquid configurations for targeted retrofits.

Technology is evolving from basic CPU-only cold plates toward high-coverage systems that cool GPUs, memory, networking chips, and other heat-generating components. CDU capacity is increasing, with product formats expanding from rack-based units to row-level and facility-level platforms. New systems place greater emphasis on redundant pumps, online filtration, automatic fluid replenishment, dynamic flow control, and leak detection. Single-phase water-based cold plate cooling remains the dominant architecture, while pumped two-phase cold plate technology is gradually gaining validation in ultra-high heat-flux environments. Future competition will increasingly focus on cold plate thermal resistance, flow distribution, connection reliability, system pressure drop, liquid cooling coverage, and end-to-end control capabilities.

Market growth is driven by investment in AI training and inference infrastructure, rising rack power density, stronger data center energy-efficiency requirements, and the maturation of the liquid-cooled server supply chain. Server, processor, cold plate, connector, and CDU suppliers are strengthening collaborative design, shifting liquid cooling from aftermarket modification toward native server integration. Standardized coolant interfaces, rack manifolds, and facility-water parameters can reduce integration complexity and support a transition from customized projects to scalable products. As more new data centers incorporate facility-water infrastructure during the design stage, deployment costs and engineering complexity are expected to decline gradually.

The industry still faces challenges related to high upfront investment, inconsistent interface standards, leakage risk, and the difficulty of retrofitting existing facilities. Server platforms differ in cold plate structures, flow rates, pressure requirements, material compatibility, and quick-disconnect specifications, increasing validation and spare-parts management costs. Cold plate systems generally do not remove all residual server heat and therefore still require supplementary air cooling or rear-door heat exchangers, adding complexity to overall system design. Future suppliers will need to demonstrate reliability and lifecycle economics through scaled manufacturing, complete system portfolios, redundant and leak-resistant designs, standardized interfaces, and

long-term operating data.

This report is a detailed and comprehensive analysis for global Non-contact Liquid Cooling System 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 Non-contact Liquid Cooling System market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Non-contact Liquid Cooling System market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Non-contact Liquid Cooling System market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Non-contact Liquid Cooling System market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K 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 Non-contact Liquid Cooling System

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 Non-contact Liquid Cooling System 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 Schneider Electric, Vertiv, Eaton, CoolIT Systems, nVent, Delta Electronics, STULZ, ZutaCore, Accelsius, Lenovo, etc.

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

Market Segmentation

Non-contact Liquid Cooling System 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

Single-phase Cold Plate Cooling

Pumped Two-phase Cold Plate Cooling

Market segment by System Configuration

Cold Plate and Loop Systems

Rack-level Cooling Systems

Row-level Cooling Systems

Other

Market segment by Cooling Capacity

Below 100 kW

100?499 kW

500?999 kW

1 MW and Above

Market segment by Application

Data Center Operators

Cloud and AI Computing Providers

HPC and Research Institutions

Other

Major players covered

Schneider Electric

Vertiv

Eaton

CoolIT Systems

nVent

Delta Electronics

STULZ

ZutaCore

Accelsius

Lenovo

Supermicro

Envicool

Inspur

Sugon Data Energy

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 Non-contact Liquid Cooling System product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Non-contact Liquid Cooling System, with price, sales quantity, revenue, and global market share of Non-contact Liquid Cooling System from 2021 to 2026.

Chapter 3, the Non-contact Liquid Cooling System competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Non-contact Liquid Cooling System 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 Non-contact Liquid Cooling System 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 Non-contact Liquid Cooling System.

Chapter 14 and 15, to describe Non-contact Liquid Cooling System sales channel, distributors, customers, research findings and conclusion.

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