

Global Non-contact Liquid Cooling System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Non-contact Liquid Cooling System market size is expected to reach \$ 15196 million by 2032, rising at a market growth of 24.2% CAGR during the forecast period (2026-2032).

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 studies the global Non-contact Liquid Cooling System production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Non-contact Liquid Cooling System total production and demand, 2021-2032, (Units)

Global Non-contact Liquid Cooling System total production value, 2021-2032, (USD Million)

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

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

U.S. VS China: Non-contact Liquid Cooling System domestic production, consumption, key domestic manufacturers and share

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

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

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

This report profiles key players in the global Non-contact Liquid Cooling 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Non-contact Liquid Cooling 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 Non-contact Liquid Cooling System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Non-contact Liquid Cooling System Market, Segmentation by Type:

Single-phase Cold Plate Cooling

Pumped Two-phase Cold Plate Cooling

Global Non-contact Liquid Cooling System Market, Segmentation by System Configuration:

Cold Plate and Loop Systems

Rack-level Cooling Systems

Row-level Cooling Systems

Other

Global Non-contact Liquid Cooling System Market, Segmentation by Cooling Capacity:

Below 100 kW

100?499 kW

500?999 kW

1 MW and Above

Global Non-contact Liquid Cooling System Market, Segmentation by Application:

Data Center Operators

Cloud and AI Computing Providers

HPC and Research Institutions

Other

Companies Profiled:

Schneider Electric

Vertiv

Eaton

CoolIT Systems

nVent

Delta Electronics

STULZ

ZutaCore

Accelsius

Lenovo

Supermicro

Envicool

Inspur

Sugon Data Energy

Key Questions Answered:

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

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