

Global Rack-Scale AI Integrated Systems Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Rack-Scale AI Integrated Systems market size is expected to reach \$ 266887 million by 2032, rising at a market growth of 17.8% CAGR during the forecast period (2026-2032).

Rack-Scale AI Integrated Systems refer to factory-integrated, rack-level or multi-rack AI computing systems designed for large language model training, real-time inference, high-performance computing, and AI factory deployments. These systems integrate AI accelerators, CPU/GPU/NPU compute trays, high-speed scale-up and scale-out networking, power distribution, liquid-cooling architecture, cabinet management, cabling, monitoring, and deployment services into a validated rack-scale delivery unit. The defining feature is not a standalone AI server, but a pre-engineered rack or rack cluster in which compute, networking, power, cooling, and management are co-designed to support high-density AI workloads. Current high-end systems such as NVIDIA GB200 / GB300 NVL72 use rack-scale liquid-cooled architectures with large GPU domains, while China-oriented systems increasingly combine domestic AI accelerators, supernode architectures, liquid cooling, and integrated cabinet delivery.

Commercial pricing is normally assessed per rack, per integrated cabinet, or per multi-rack cluster, with premium systems reaching multi-million-dollar levels depending on accelerator type, memory configuration, interconnect fabric, cooling method, and service scope.

Based on our research, Rack-Scale AI Integrated Systems represent a structural shift from server-level procurement to rack-level, factory-integrated AI infrastructure delivery. The market is not merely an extension of conventional server racks or standalone GPU servers. It is defined by the integration of AI accelerators, CPU/GPU/NPU compute

trays, scale-up interconnects, networking, power distribution, liquid cooling, cabinet management, software control, and deployment services into a validated rack-scale unit. The relevant statistical boundary should therefore focus on rack-level AI compute systems and exclude cloud rental revenue, facility construction, standalone cooling components, and ordinary single-node AI servers.

From a supply-side perspective, the global market is shaped by four major groups: U.S.-led platform architecture, Taiwan-based ODM manufacturing, global OEM-branded delivery, and China's domestic supernode ecosystem. NVIDIA's GB200 / GB300 NVL72 architecture has become the most visible high-end reference point for rack-scale AI systems. Dell, HPE, Lenovo, and Supermicro focus on branded enterprise and cloud-scale deployments, while Quanta/QCT, Wistron, Hon Hai/Ingrasys, Wistron, Inventec, and Pegatron play critical roles in rack-level manufacturing, integration, validation, and supply-chain execution. In China, Huawei, xFusion, H3C, Inspur, and Dawning are developing an alternative supply base around domestic accelerators, liquid-cooled cabinets, supernode architectures, and intelligent computing center deployments.

Demand growth is driven by large-model training, high-throughput inference, sovereign AI, AI cloud expansion, telecom and enterprise AI infrastructure, and HPC-AI convergence. Buyers are moving away from purchasing isolated GPU servers and toward integrated systems that reduce deployment complexity, improve interconnect efficiency, simplify cooling and power design, and shorten time-to-production. The commercial value of the rack-scale system lies in its ability to convert chip-level performance into deployable, manageable, and scalable AI infrastructure at data-center scale.

This report studies the global Rack-Scale AI Integrated Systems production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Rack-Scale AI Integrated Systems 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 Rack-Scale AI Integrated Systems that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Rack-Scale AI Integrated Systems total production and demand, 2021-2032, (Units)

Global Rack-Scale AI Integrated Systems total production value, 2021-2032, (USD

Million)

Global Rack-Scale AI Integrated Systems production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Rack-Scale AI Integrated Systems consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Rack-Scale AI Integrated Systems domestic production, consumption, key domestic manufacturers and share

Global Rack-Scale AI Integrated Systems production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Rack-Scale AI Integrated Systems production by System Architecture, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Rack-Scale AI Integrated Systems production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Rack-Scale AI Integrated Systems 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 NVIDIA Corporation, Dell Technologies Inc., HPE, Supermicro, Lenovo Group, Quanta, Wiyynn Corporation, Hon Hai, Wistron Corporation, Inventec Corporation, 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 Rack-Scale AI Integrated Systems market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by System Architecture, 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 Rack-Scale AI Integrated Systems Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Rack-Scale AI Integrated Systems Market, Segmentation by System Architecture:

NVIDIA NVL Rack-Scale System

Domestic AI Supernode System

Open / Multi-Accelerator Rack System

Other

Global Rack-Scale AI Integrated Systems Market, Segmentation by Cooling Method:

Direct Liquid-Cooled Rack

Hybrid Air-Liquid Rack

Rear-Door / Cabinet-Assisted Cooling Rack

Other

Global Rack-Scale AI Integrated Systems Market, Segmentation by Accelerator

Ecosystem:

NVIDIA GPU-Based System

Domestic NPU / GPU-Based System

Multi-Vendor Accelerator System

Other

Global Rack-Scale AI Integrated Systems Market, Segmentation by Delivery Model:

Factory-Integrated Rack

On-Site Integrated Rack Cluster

Reference Design / Partner-Built Rack

Other

Global Rack-Scale AI Integrated Systems Market, Segmentation by Application:

Large Model Training

High-Throughput Inference

AI Cloud / GPU Cloud

Enterprise AI Infrastructure

Other

Companies Profiled:

NVIDIA Corporation

Dell Technologies Inc.

HPE

Supermicro

Lenovo Group

Quanta

Wiiwynn Corporation

Hon Hai

Wistron Corporation

Inventec Corporation

Pegatron Corporation

GIGA-BYTE

ASUS

ASRock Rack

xFusion

H3C

Huawei Technologies

Aivres Systems

Key Questions Answered:

1. How big is the global Rack-Scale AI Integrated Systems market?
2. What is the demand of the global Rack-Scale AI Integrated Systems market?
3. What is the year over year growth of the global Rack-Scale AI Integrated Systems

market?

4. What is the production and production value of the global Rack-Scale AI Integrated Systems market?
5. Who are the key producers in the global Rack-Scale AI Integrated Systems market?
6. What are the growth factors driving the market demand?

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