

Global Shell-and-Tube Heat Exchangers for AI Training Cluster Cooling Systems 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 Shell-and-Tube Heat Exchangers for AI Training Cluster Cooling Systems market size was valued at US\$ 196 million in 2025 and is forecast to a readjusted size of US\$ 535 million by 2032 with a CAGR of 14.2% during review period.

Shell-and-tube heat exchangers for AI training cluster cooling systems are indirect heat transfer devices used in the cooling infrastructure of AI training data centres, intelligent computing facilities and high-density GPU clusters. Structurally, they consist of a shell, tube bundle, tube sheets, baffles, heads and nozzles, allowing chilled water, condenser water, glycol mixtures, refrigerants or other engineering fluids to exchange heat across the tube wall between shell-side and tube-side circuits. In AI training environments, these exchangers are primarily deployed within chiller evaporators or condensers, primary cooling plants, facility-water isolation loops, liquid-cooling support systems, free-cooling arrangements and heat recovery modules. Their role is not to cool the processor directly, but to provide a robust, maintainable and certifiable thermal bridge for mission-critical cooling infrastructure. Pricing varies widely: small standard coolers may be priced from several thousand US dollars, while medium and large customised exchangers for data-centre cooling plants can reach several hundred thousand dollars or more per unit.

Based on our research, shell-and-tube heat exchangers for AI training cluster cooling systems should not be treated as a newly created product category detached from the traditional heat exchanger industry. They are better understood as a mature pressure-

vessel heat transfer technology being redeployed into mission-critical cooling infrastructure for high-density AI computing. The product should not be described as an 'air-cooled' component. Its engineering role is to provide stable indirect heat transfer in chilled-water plants, chiller evaporators or condensers, facility-water loops, glycol systems and heat recovery arrangements. In direct-to-chip or immersion liquid cooling, heat is captured close to processors, but it still has to be rejected into facility water, dry coolers, chillers or broader thermal infrastructure. This is where robust heat exchangers remain essential. However, shell-and-tube units do not cover the entire data-centre heat exchanger market. Plate heat exchangers are often more common in compact CDU and liquid-to-liquid modules, while shell-and-tube designs are more relevant in larger, higher-pressure, more serviceable or chiller-integrated applications.

The global supply base is structurally layered. North America and Europe remain the strongest regions for TEMA-type engineering, ASME/PED pressure-vessel fabrication and high-end custom shell-and-tube heat exchangers. Specialist manufacturers such as API Heat Transfer, Xylem Standard Xchange, Metalforms Heat Transfer, FUNKE, Bronswerk and Enerquip provide clear shell-and-tube product evidence. At the same time, data-centre cooling system OEMs such as Johnson Controls, Trane, Carrier and Dunham-Bush participate through chillers and cooling plants, where the shell-and-tube component value is often embedded within larger systems. China is becoming increasingly important because AI computing centres, liquid-cooling systems, domestic thermal management suppliers and industrial cooling equipment makers are growing together. Chinese suppliers such as Envicool, Sanhe Tongfei and Binglun Environment are relevant to the broader cooling infrastructure chain, although the revenue directly attributable to shell-and-tube heat exchangers requires careful separation from total system revenue.

Demand growth is being driven by three primary forces. First, new AI training data centres require larger and more resilient cooling plants as GPU cluster density rises. Second, existing data centres are being retrofitted for hybrid air-liquid and liquid-cooling deployments, creating demand for primary-side heat exchange, hydraulic separation and redundancy. Third, pressure to reduce PUE, WUE and power-system stress is making cooling infrastructure a board-level and site-selection issue rather than a back-end mechanical service. The market is therefore not simply growing because more heat exchangers are needed; it is growing because thermal infrastructure has become a constraint on AI deployment. Shell-and-tube products will benefit selectively, particularly where high duty, pressure tolerance, corrosion resistance, inspectability and long operating life are valued more than footprint minimisation.

The future competitive landscape will be shaped by integration rather than by component manufacturing alone. Shell-and-tube heat exchanger suppliers that can work with chiller OEMs, liquid-cooling integrators, data-centre EPC contractors and hyperscale owners will have stronger access to AI-related demand. Manufacturers with pressure-vessel certification, short engineering cycles, proven thermal design capability, material flexibility and global service support will be better positioned than commodity fabricators. At the same time, substitution risk from plate heat exchangers remains real in compact CDU and liquid-to-liquid applications. The practical conclusion is that this is a mature industry with a new growth vector, not a broad-based hypergrowth component market. The investable and strategic opportunity lies in the intersection of high-reliability heat transfer engineering, AI data-centre cooling architecture and regional supply-chain localisation.

This report is a detailed and comprehensive analysis for global Shell-and-Tube Heat Exchangers for AI Training Cluster Cooling Systems market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Product Configuration 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 Shell-and-Tube Heat Exchangers for AI Training Cluster Cooling Systems market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Shell-and-Tube Heat Exchangers for AI Training Cluster Cooling Systems market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Shell-and-Tube Heat Exchangers for AI Training Cluster Cooling Systems market size and forecasts, by Product Configuration and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Shell-and-Tube Heat Exchangers for AI Training Cluster Cooling Systems market shares of main players, shipments in revenue (\$ Million), sales quantity (Units),

and ASP (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 Shell-and-Tube Heat Exchangers for AI Training Cluster Cooling Systems

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 Shell-and-Tube Heat Exchangers for AI Training Cluster Cooling Systems 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 API Heat Transfer, Johnson Controls, Kelvion, Xylem Standard Xchange, Metalforms Heat Transfer, FUNKE, Bronswerk Heat Transfer, Binglun Environment, Enerquip Thermal Solutions, Graham Corporation, etc.

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

Market Segmentation

Shell-and-Tube Heat Exchangers for AI Training Cluster Cooling Systems market is split by Product Configuration and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Product Configuration, 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 Product Configuration

Fixed Tubesheet Shell-and-Tube Heat Exchanger

U-Tube Shell-and-Tube Heat Exchanger

Floating Head Shell-and-Tube Heat Exchanger

Other

Market segment by System Position

Chiller-integrated Heat Exchanger

Primary Cooling Plant Heat Exchanger

Liquid-cooling Support Heat Exchanger

Heat Recovery Heat Exchanger

Market segment by Heat Transfer Media

Water-to-Water

Glycol-to-Water

Refrigerant-to-Water

Other

Market segment by Manufacturing Model

Specialist Heat Exchanger OEM

Chiller / Cooling System OEM

Pressure Vessel Fabricator

System Integrator / Non-manufacturer

Market segment by Application

Hyperscale AI Training Data Center

Colocation AI Computing Facility

Enterprise / Research HPC Facility

Edge / Modular AI Data Center

Other

Major players covered

API Heat Transfer

Johnson Controls

Kelvion

Xylem Standard Xchange

Metalforms Heat Transfer

FUNKE

Bronswerk Heat Transfer

Binglun Environment

Enerquip Thermal Solutions

Graham Corporation

Hughes-Anderson

SACOME

HRS Heat Exchangers

E.J. Bowman

Sanhe Tongfei

Taiwan Heat Transfer

Kaori

Trane Technologies

Carrier Global

Dunham-Bush

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 Shell-and-Tube Heat Exchangers for AI Training Cluster Cooling Systems product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Shell-and-Tube Heat Exchangers for AI Training Cluster Cooling Systems, with price, sales quantity, revenue, and global market share of Shell-and-Tube Heat Exchangers for AI Training Cluster Cooling Systems from 2021 to 2026.

Chapter 3, the Shell-and-Tube Heat Exchangers for AI Training Cluster Cooling Systems competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Shell-and-Tube Heat Exchangers for AI Training Cluster Cooling Systems 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 Product Configuration and by Application, with sales market share and growth rate by Product Configuration, 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 Shell-and-Tube Heat Exchangers for AI Training Cluster Cooling Systems market forecast, by regions, by Product Configuration, 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 Shell-and-Tube Heat Exchangers for AI Training Cluster Cooling Systems.

Chapter 14 and 15, to describe Shell-and-Tube Heat Exchangers for AI Training Cluster Cooling Systems sales channel, distributors, customers, research findings and conclusion.

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