

Global Sustainable AI Data Center Infrastructure Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Sustainable AI Data Center Infrastructure market size is expected to reach \$ 175454 million by 2032, rising at a market growth of 17.8% CAGR during the forecast period (2026-2032).

Sustainable AI Data Center Infrastructure refers to the set of engineered products, integrated systems, software platforms and lifecycle services that enable AI training, AI inference, high-performance computing and dense GPU clusters to operate with higher energy efficiency, lower water intensity, improved carbon transparency and greater facility resilience. The scope primarily covers high-density power distribution, UPS systems, switchgear, PDUs, busways, medium- and low-voltage electrical systems, HVDC architectures, coolant distribution units, cold plates, immersion tanks, rear-door heat exchangers, dry coolers, CRAH/CRAC systems, heat exchangers, dielectric fluids, prefabricated modular data centers, AI compute pods, DCIM, BMS, energy management software, carbon and water monitoring platforms, battery energy storage, fuel cells, standby generation and microgrid integration for AI data center environments. The defining technical features of this market are high rack power density, thermal stability, low PUE, low WUE, modular scalability, shortened deployment cycles, digital monitoring and lifecycle reliability.

Indicative pricing varies significantly by configuration: rack-level or row-level CDUs may range from tens of thousands to several hundred thousand US dollars, immersion cooling tanks and prefabricated power/cooling modules are typically project-priced from hundreds of thousands to several million US dollars, while large AI data center power and cooling packages can reach tens or hundreds of millions of US dollars depending on capacity and redundancy requirements.

Based on our research, Sustainable AI Data Center Infrastructure should be understood as a facility-level systems market rather than a generic green IT theme. The market is being shaped by the structural mismatch between rapidly rising AI compute density and legacy data center power and cooling architectures. Conventional data center efficiency programs were largely built around PUE improvement, redundancy, space utilisation and mechanical-electrical reliability. AI data centers add a more demanding layer: dense GPU clusters, sharply higher rack power, dynamic load profiles, liquid-cooling interfaces, grid-connection constraints, shortened deployment cycles and mounting transparency requirements around energy and water use. The IEA's outlook for data center electricity demand and the European Union's energy-performance reporting framework both point to a market in which efficiency, resilience and sustainability are becoming hard infrastructure requirements rather than discretionary ESG attributes.

From a supply-side perspective, the competitive landscape is becoming multi-layered. Global electrical and automation groups, critical digital infrastructure providers, precision cooling companies, specialist liquid-cooling vendors, Asian AI hardware supply chains and on-site power solution providers are converging around the same demand pool. Schneider Electric, Vertiv, Eaton, ABB, Legrand, Johnson Controls, Trane and Carrier bring scale, global service networks and integrated power-cooling capabilities. CoolIT, Submer, LiquidStack, Motivair, Envicool and other specialists bring deeper technology exposure to CDUs, cold plates, immersion systems and high-density liquid-cooling architectures. The recent strategic acquisitions and proposed acquisitions of liquid-cooling assets show that the market is moving from experimentation into industrial consolidation.

Regionally, North America remains the strongest demand and innovation centre for AI data center build-out, liquid-cooling start-ups and on-site power solutions. Europe retains advantages in electrification, precision cooling, enclosure systems, controls and regulatory-driven sustainability. China is building a rapidly expanding domestic ecosystem around intelligent computing centers, liquid cooling, modular facilities and digital energy infrastructure. Taiwan is particularly important in the AI hardware supply chain, where power modules, thermal components, rack-scale systems and ODM relationships connect facility requirements with server and accelerator design. Over the next cycle, competition will be determined less by single-product pricing and more by deployment speed, liquid-cooling reliability, rack-level standardisation, energy and water performance, global service capability and alignment with semiconductor and server ecosystems.

This report studies the global Sustainable AI Data Center Infrastructure demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Sustainable AI Data Center Infrastructure, 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 Sustainable AI Data Center Infrastructure that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Sustainable AI Data Center Infrastructure total market, 2021-2032, (USD Million)

Global Sustainable AI Data Center Infrastructure total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Sustainable AI Data Center Infrastructure total market, key domestic companies, and share, (USD Million)

Global Sustainable AI Data Center Infrastructure revenue by player, revenue and market share 2021-2026, (USD Million)

Global Sustainable AI Data Center Infrastructure total market by Infrastructure Function, CAGR, 2021-2032, (USD Million)

Global Sustainable AI Data Center Infrastructure total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Sustainable AI Data Center Infrastructure market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Schneider Electric SE, Vertiv Holdings Co, Eaton Corporation plc, ABB Ltd, Delta Electronics, Inc., Huawei Digital Power, Johnson Controls, Trane Technologies, Legrand SA, Rittal, 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 Sustainable AI Data Center Infrastructure market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$

Millions), by player, by regions, by Infrastructure Function, 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 Sustainable AI Data Center Infrastructure Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Sustainable AI Data Center Infrastructure Market, Segmentation by Infrastructure Function:

Thermal Management Infrastructure

Power and Electrical Infrastructure

Modular Facility Infrastructure

Sustainability and Operations Software

On-site Energy and Resilience Systems

Global Sustainable AI Data Center Infrastructure Market, Segmentation by Cooling Technology:

Advanced Air and Hybrid Cooling

Direct-to-Chip Liquid Cooling

Immersion Cooling

Two-phase / Waterless Liquid Cooling

Other

Global Sustainable AI Data Center Infrastructure Market, Segmentation by Power Architecture:

Conventional AC UPS and Distribution

High-voltage DC / Advanced DC Distribution

Medium-voltage and Grid-interface Systems

On-site Power and Microgrid Systems

Other

Global Sustainable AI Data Center Infrastructure Market, Segmentation by Sustainability Value Lever:

Energy Efficiency Improvement

Water Efficiency and Waterless Operation

Carbon Reduction and Clean Power Integration

Deployment Efficiency and Resource Optimization

Other

Global Sustainable AI Data Center Infrastructure Market, Segmentation by Application:

Hyperscale AI Training Facilities

AI Inference and Cloud Service Data Centers

Colocation AI Hosting Facilities

Enterprise and Sovereign AI Facilities

Edge and Specialized AI Facilities

Other

Companies Profiled:

Schneider Electric SE

Vertiv Holdings Co

Eaton Corporation plc

ABB Ltd

Delta Electronics, Inc.

Huawei Digital Power

Johnson Controls

Trane Technologies

Legrand SA

Rittal

nVent Electric

STULZ GmbH

Munters Group AB

Daikin Industries

Carrier Global

Envicool

Shenling

CoolIT Systems

Motivair

Submer

LiquidStack

Asetek

Nidec Corporation

LG Electronics

Mitsubishi Electric

Hon Hai Precision Industry

Lenovo Group

HPE

Supermicro

Quanta

Wiwynn

Kaori

Alfa Laval

Kelvion

Bloom Energy

Cummins

Caterpillar

Kstar

Kehua Data

Goaland

Key Questions Answered

1. How big is the global Sustainable AI Data Center Infrastructure market?
2. What is the demand of the global Sustainable AI Data Center Infrastructure market?
3. What is the year over year growth of the global Sustainable AI Data Center Infrastructure market?
4. What is the total value of the global Sustainable AI Data Center Infrastructure market?
5. Who are the Major Players in the global Sustainable AI Data Center Infrastructure market?
6. What are the growth factors driving the market demand?

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