

Global Water-cooled Cabinet Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Water-cooled Cabinet market size is expected to reach \$ 7894 million by 2032, rising at a market growth of 15.7% CAGR during the forecast period (2026-2032).

In 2025, global Water-cooled Cabinet production reached approximately 0.153 M Units. The average price is approximately \$18,000. Water-cooled Cabinet refers to rack-level thermal management equipment designed for high-density AI, HPC, supercomputing, cloud and colocation data center environments.

Water-cooled Cabinet should be understood as a rack-level thermal infrastructure market rather than a conventional rack, HVAC, CDU-only or server-only market. The rapid increase in AI rack power density is pushing data center cooling from room-level air cooling toward rack-level heat capture and liquid heat rejection. Direct-to-chip liquid-cooled racks, rear door heat exchanger racks, in-rack CDUs, rack manifolds and immersion tanks are moving from pilot deployments to scalable rollouts. In this report, the narrow market boundary covers rack-level equipment that can be delivered as part of a data center liquid cooling cabinet or rack system. It does not count the full value of GPUs, CPUs or servers, because the liquid cooling infrastructure represents only a portion of a high-value AI rack. This distinction is critical for market sizing, vendor ranking and competitive analysis.

From the supply-side perspective, the industry is taking shape around three major groups of suppliers. The first group consists of data center infrastructure and thermal management companies such as Vertiv, Schneider Electric, Rittal, STULZ, Delta, nVent, Panduit, Munters and Daikin, which have strong capabilities in CDUs, rear door heat exchangers, rack systems, power distribution and facility-side interfaces. The second group consists of server and ICT system suppliers such as Dell, HPE, Lenovo,

Supermicro, xFusion, H3C, Inspur, ZTE and FII, which are closer to AI rack integration and customer compute infrastructure decisions. The third group consists of specialized liquid cooling companies such as CoolIT, Submer, LiquidStack, GRC, Iceotope, Asperitas, ZutaCore and Asetek, which provide differentiated technologies in cold plates, immersion cooling, two-phase cooling, rack manifolds and high-density thermal systems. The boundaries among these groups are increasingly blurred as partnerships, OEM supply relationships and acquisitions accelerate.

Demand is being led by AI training clusters and high-density AI inference deployments, followed by HPC, supercomputing, hyperscale cloud data centers, colocation retrofits and edge computing. China is seeing rapid adoption driven by intelligent computing center construction, data center energy-efficiency requirements and domestic server supply chain localization. North America is driven by hyperscale capital expenditure, AI infrastructure build-out and a mature liquid cooling supplier ecosystem. Europe is more focused on energy efficiency, water stewardship, heat reuse, modularity and immersion cooling innovation. Because customers differ in their tolerance for water use, maintenance complexity, retrofit difficulty, IT hardware compatibility and upfront capex, direct-to-chip, rear door heat exchangers, immersion cooling and hybrid air-liquid architectures are expected to coexist for a long period.

From a technology evolution perspective, direct-to-chip cold plate liquid cooling is likely to become the mainstream route over 2025-2032 because it offers better compatibility with existing rack, server and facility architectures. Rear door heat exchangers will remain important for high-density retrofit projects and hybrid cooling environments. Immersion cooling will continue to grow in extreme-density, edge, special HPC and sustainability-driven deployments, but its adoption depends on operating standards, server certification, fluid compatibility and maintenance practices. Future competition will shift from proving cooling capability to demonstrating scalable delivery, lower total cost of ownership, reliable field operations, ecosystem compatibility and the ability to align with the AI server supply chain.

This report studies the global Water-cooled Cabinet production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Water-cooled Cabinet 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 Water-cooled Cabinet that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Water-cooled Cabinet total production and demand, 2021-2032, (K Units)

Global Water-cooled Cabinet total production value, 2021-2032, (USD Million)

Global Water-cooled Cabinet production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Water-cooled Cabinet consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Water-cooled Cabinet domestic production, consumption, key domestic manufacturers and share

Global Water-cooled Cabinet production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Water-cooled Cabinet production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Water-cooled Cabinet production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Water-cooled Cabinet 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 Vertiv Holdings Co, Schneider Electric, Dell Technologies, Supermicro, CoolIT Systems, HPE, Lenovo Group, Delta Electronics, Rittal, nVent, 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 Water-cooled Cabinet market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (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 Water-cooled Cabinet Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Water-cooled Cabinet Market, Segmentation by Type:

Cold-Plate Liquid Cooling Cabinet

Immersion Liquid Cooling Cabinet

Others

Global Water-cooled Cabinet Market, Segmentation by Single-Rack Power Density:

Low Power Density Cabinet: ≤ 30 kW

Medium Power Density Cabinet: $30\text{--}60$ kW

High Power Density Cabinet: $60\text{--}100$ kW

Ultra-High Power Density Cabinet: $100\text{--}200$ kW

Extreme Power Density Cabinet: >200 kW

Global Water-cooled Cabinet Market, Segmentation by Integration Level:

Standalone Liquid-Cooled Cabinet

Integrated Liquid-Cooled Cabinet

Modular Liquid-Cooled Cabinet

Global Water-cooled Cabinet Market, Segmentation by Application:

Internet and Cloud Computing Industry

Artificial Intelligence Industry

Telecommunications Industry

Others

Companies Profiled:

Vertiv Holdings Co

Schneider Electric

Dell Technologies

Supermicro

CoolIT Systems

HPE

Lenovo Group

Delta Electronics

Rittal

nVent

STULZ

xFusion

H3C

Inspur Electronic Information

ZTE Corporation

FII

Panduit

Munters

Daikin Applied

Boyd Corporation

Canatal

Shenling

Submer

LiquidStack

GRC

Iceotope

Key Questions Answered:

1. How big is the global Water-cooled Cabinet market?
2. What is the demand of the global Water-cooled Cabinet market?

3. What is the year over year growth of the global Water-cooled Cabinet market?
4. What is the production and production value of the global Water-cooled Cabinet market?
5. Who are the key producers in the global Water-cooled Cabinet market?
6. What are the growth factors driving the market demand?

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