

Global Advanced Cooling Server Market Growth 2026-2032

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Abstracts

The global Advanced Cooling Server market size is predicted to grow from US\$ 30139 million in 2025 to US\$ 148824 million in 2032; it is expected to grow at a CAGR of 19.6% from 2026 to 2032.

In 2025, global Advanced Cooling Server production reached approximately 15.3 M Units. Prices range from the thousand-yuan level to the million-yuan level. Advanced Cooling Server are server equipment and rack-scale computing systems designed for high-power-density computing environments. They use direct-to-chip liquid cooling, cold-plate cooling, single-phase or two-phase immersion cooling, and hybrid air-liquid cooling architectures to transfer heat from critical heat sources such as CPUs, GPUs, AI accelerators, memory modules, high-speed interconnect chips, switching devices, and power modules into a liquid-based thermal loop.

Advanced Cooling Server should not be viewed as a simple thermal upgrade to conventional servers. They represent a structural shift in high-power-density AI and HPC infrastructure from standalone server procurement toward node-level, rack-level, and cluster-level integrated delivery. Since 2025, AI training clusters, GB200/GB300 NVL-class rack-scale systems, dense 8-GPU servers, and sovereign AI data center projects have sharply increased server thermal design power and rack power density. In these environments, traditional air cooling is increasingly constrained by heat dissipation, acoustic limits, energy efficiency, and physical space. For this reason, this report adopts ?Liquid-Cooled Servers? as the standard market name and defines the statistical boundary around server nodes, complete servers, liquid-cooled AI racks, AI PODs, and rack-scale computing systems. It does not expand the market scope to standalone CDUs, cooling towers, cold plates, coolant fluids, or data center air-conditioning equipment.

From a supply-side perspective, the global liquid-cooled server market is structured around four major groups: North American platform and branded OEMs, Taiwan-based hyperscale ODMs, Chinese domestic server vendors, and specialized European and Japanese HPC suppliers. North America is led by NVIDIA, Dell, HPE, Supermicro, Aivres, AMAX, and Sanmina/ZT-related manufacturing assets. Taiwan plays a central role in global AI server manufacturing through QCT, Ingrasys, Wiwynn, Pegatron, ASUS, GIGABYTE, and other ODM/OEM suppliers that support Blackwell, HGX, GB200, and GB300 rack-scale platforms. Mainland China has a distinct local supplier base represented by Huawei, H3C, xFusion, Inspur, Sugon, and Nettrix, mainly serving telecom, cloud, government, enterprise AI, and HPC customers. Europe and Japan have fewer suppliers, but Eviden, 2CRSi, Fujitsu, and NEC remain relevant in supercomputing, immersion cooling, and high-end HPC systems.

Demand growth is not evenly distributed across the entire server industry. It is concentrated in AI training, AI inference, high-performance computing, hyperscale cloud clusters, telecom AI data centers, and national supercomputing programs. Many conventional enterprise workloads, low-power edge deployments, and general-purpose servers will continue to use air cooling or hybrid air-liquid designs. Therefore, the liquid-cooled server market should not be estimated by simply applying a broad ratio to the global server market. Under the narrow OEM system-revenue scope used in this report, the global liquid-cooled server market is estimated at USD 30.80 billion in 2025 and USD 52.60 billion in 2026, with a projected CAGR of 20.75% from 2026 to 2032. The growth is mainly driven by rack-scale AI system deployment, increasing accelerator power, tighter data center efficiency requirements, AI factory capital expenditure, and a maturing liquid-cooling supply chain.

From a product-route perspective, direct-to-chip cold-plate cooling is expected to remain the dominant commercial architecture through 2032 because it offers a practical balance among thermal performance, maintainability, reliability, and retrofit feasibility. Immersion cooling has clear value in ultra-high-density HPC, specialized edge environments, and highly energy-sensitive deployments, but its broader adoption depends on coolant compatibility, operational practices, standardization, and customer acceptance. Hybrid air-liquid designs will remain important in retrofit projects and mixed-density data centers. As OCP, ASHRAE, and major server vendors continue to standardize liquid-cooling environments, rack interfaces, coolant loops, and operating practices, liquid-cooled servers are likely to evolve from customized engineering projects into repeatable platform products.

LP Information, Inc. (LPI) ' newest research report, the "Advanced Cooling Server Industry Forecast" looks at past sales and reviews total world Advanced Cooling Server sales in 2025, providing a comprehensive analysis by region and market sector of projected Advanced Cooling Server sales for 2026 through 2032. With Advanced Cooling Server sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Advanced Cooling Server industry.

This Insight Report provides a comprehensive analysis of the global Advanced Cooling Server landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Advanced Cooling Server portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Advanced Cooling Server market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Advanced Cooling Server and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Advanced Cooling Server.

This report presents a comprehensive overview, market shares, and growth opportunities of Advanced Cooling Server market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Cold Plate Liquid Cooling

Immersion Liquid Cooling

Spray Liquid Cooling

Others

Segmentation by Cooling Medium:

Water-Based Coolant

Mineral Oil

Fluorinated Fluid

Others

Segmentation by Power Density Per Cabinet:

Low Power Density: ≤ 30 kW/Rack

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

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

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

Extreme Power Density: ≥ 200 kW/Rack

Segmentation by Application:

Artificial Intelligence and Deep Learning

Cloud Computing and Hyperscale Data Centers

High-Performance Computing and Supercomputing Centers

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

NVIDIA

Foxconn

Quanta

Supermicro

Dell Technologies

Wiwynn

Pegatron

HPE

Lenovo

xFusion

Huawei

ASUS

GIGABYTE

H3C

Aivres

Inspur

Sanmina

Eviden

Fujitsu

Nettrix

Sugon

NEC

2CRSi

AMAX

MiTAC

Key Questions Addressed in this Report

What is the 10-year outlook for the global Advanced Cooling Server market?

What factors are driving Advanced Cooling Server market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Advanced Cooling Server market opportunities vary by end market size?

How does Advanced Cooling Server break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Advanced Cooling Server Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Advanced Cooling Server by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Advanced Cooling Server by Country/Region, 2021, 2025 & 2032
- 2.2 Advanced Cooling Server Segment by Type
 - 2.2.1 Cold Plate Liquid Cooling
 - 2.2.2 Immersion Liquid Cooling
 - 2.2.3 Spray Liquid Cooling
 - 2.2.4 Others
 - 2.2.5 Advanced Cooling Server Sales by Type
 - 2.2.5.1 Global Advanced Cooling Server Sales Market Share by Type (2021-2026)
 - 2.2.5.2 Global Advanced Cooling Server Revenue and Market Share by Type (2021-2026)
 - 2.2.5.3 Global Advanced Cooling Server Sale Price by Type (2021-2026)
- 2.3 Advanced Cooling Server Segment by Cooling Medium
 - 2.3.1 Water-Based Coolant
 - 2.3.2 Mineral Oil
 - 2.3.3 Fluorinated Fluid
 - 2.3.4 Others
 - 2.3.5 Advanced Cooling Server Sales by Cooling Medium
 - 2.3.5.1 Global Advanced Cooling Server Sales Market Share by Cooling Medium (2021-2026)

2.3.5.2 Global Advanced Cooling Server Revenue and Market Share by Cooling Medium (2021-2026)

2.3.5.3 Global Advanced Cooling Server Sale Price by Cooling Medium (2021-2026)

2.4 Advanced Cooling Server Segment by Power Density Per Cabinet

2.4.1 Low Power Density: ≤ 30 kW/Rack

2.4.2 Medium Power Density: 30-60 kW/Rack

2.4.3 High Power Density: 60-100 kW/Rack

2.4.4 Ultra-High Power Density: 100-200 kW/Rack

2.4.5 Extreme Power Density: ≥ 200 kW/Rack

2.4.6 Advanced Cooling Server Sales by Power Density Per Cabinet

2.4.6.1 Global Advanced Cooling Server Sales Market Share by Power Density Per Cabinet (2021-2026)

2.4.6.2 Global Advanced Cooling Server Revenue and Market Share by Power Density Per Cabinet (2021-2026)

2.4.6.3 Global Advanced Cooling Server Sale Price by Power Density Per Cabinet (2021-2026)

2.5 Advanced Cooling Server Segment by Application

2.5.1 Artificial Intelligence and Deep Learning

2.5.2 Cloud Computing and Hyperscale Data Centers

2.5.3 High-Performance Computing and Supercomputing Centers

2.5.4 Others

2.5.5 Advanced Cooling Server Sales by Application

2.5.5.1 Global Advanced Cooling Server Sale Market Share by Application (2021-2026)

2.5.5.2 Global Advanced Cooling Server Revenue and Market Share by Application (2021-2026)

2.5.5.3 Global Advanced Cooling Server Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Advanced Cooling Server Breakdown Data by Company

3.1.1 Global Advanced Cooling Server Annual Sales by Company (2021-2026)

3.1.2 Global Advanced Cooling Server Sales Market Share by Company (2021-2026)

3.2 Global Advanced Cooling Server Annual Revenue by Company (2021-2026)

3.2.1 Global Advanced Cooling Server Revenue by Company (2021-2026)

3.2.2 Global Advanced Cooling Server Revenue Market Share by Company (2021-2026)

3.3 Global Advanced Cooling Server Sale Price by Company

3.4 Key Manufacturers Advanced Cooling Server Producing Area Distribution, Sales

Area, Product Type

- 3.4.1 Key Manufacturers Advanced Cooling Server Product Location Distribution
- 3.4.2 Players Advanced Cooling Server Products Offered
- 3.5 Market Concentration Rate Analysis
 - 3.5.1 Competition Landscape Analysis
 - 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR ADVANCED COOLING SERVER BY GEOGRAPHIC REGION

- 4.1 World Historic Advanced Cooling Server Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global Advanced Cooling Server Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global Advanced Cooling Server Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Advanced Cooling Server Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Advanced Cooling Server Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Advanced Cooling Server Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Advanced Cooling Server Sales Growth
- 4.4 APAC Advanced Cooling Server Sales Growth
- 4.5 Europe Advanced Cooling Server Sales Growth
- 4.6 Middle East & Africa Advanced Cooling Server Sales Growth

5 AMERICAS

- 5.1 Americas Advanced Cooling Server Sales by Country
 - 5.1.1 Americas Advanced Cooling Server Sales by Country (2021-2026)
 - 5.1.2 Americas Advanced Cooling Server Revenue by Country (2021-2026)
- 5.2 Americas Advanced Cooling Server Sales by Type (2021-2026)
- 5.3 Americas Advanced Cooling Server Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

6.1 APAC Advanced Cooling Server Sales by Region

6.1.1 APAC Advanced Cooling Server Sales by Region (2021-2026)

6.1.2 APAC Advanced Cooling Server Revenue by Region (2021-2026)

6.2 APAC Advanced Cooling Server Sales by Type (2021-2026)

6.3 APAC Advanced Cooling Server Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Advanced Cooling Server by Country

7.1.1 Europe Advanced Cooling Server Sales by Country (2021-2026)

7.1.2 Europe Advanced Cooling Server Revenue by Country (2021-2026)

7.2 Europe Advanced Cooling Server Sales by Type (2021-2026)

7.3 Europe Advanced Cooling Server Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Advanced Cooling Server by Country

8.1.1 Middle East & Africa Advanced Cooling Server Sales by Country (2021-2026)

8.1.2 Middle East & Africa Advanced Cooling Server Revenue by Country (2021-2026)

8.2 Middle East & Africa Advanced Cooling Server Sales by Type (2021-2026)

8.3 Middle East & Africa Advanced Cooling Server Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Advanced Cooling Server

10.3 Manufacturing Process Analysis of Advanced Cooling Server

10.4 Industry Chain Structure of Advanced Cooling Server

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Advanced Cooling Server Distributors

11.3 Advanced Cooling Server Customer

12 WORLD FORECAST REVIEW FOR ADVANCED COOLING SERVER BY GEOGRAPHIC REGION

12.1 Global Advanced Cooling Server Market Size Forecast by Region

12.1.1 Global Advanced Cooling Server Forecast by Region (2027-2032)

12.1.2 Global Advanced Cooling Server Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Advanced Cooling Server Forecast by Type (2027-2032)

12.7 Global Advanced Cooling Server Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 NVIDIA

13.1.1 NVIDIA Company Information

13.1.2 NVIDIA Advanced Cooling Server Product Portfolios and Specifications

13.1.3 NVIDIA Advanced Cooling Server Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 NVIDIA Main Business Overview

13.1.5 NVIDIA Latest Developments

13.2 Foxconn

13.2.1 Foxconn Company Information

13.2.2 Foxconn Advanced Cooling Server Product Portfolios and Specifications

13.2.3 Foxconn Advanced Cooling Server Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Foxconn Main Business Overview

13.2.5 Foxconn Latest Developments

13.3 Quanta

13.3.1 Quanta Company Information

13.3.2 Quanta Advanced Cooling Server Product Portfolios and Specifications

13.3.3 Quanta Advanced Cooling Server Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Quanta Main Business Overview

13.3.5 Quanta Latest Developments

13.4 Supermicro

13.4.1 Supermicro Company Information

13.4.2 Supermicro Advanced Cooling Server Product Portfolios and Specifications

13.4.3 Supermicro Advanced Cooling Server Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Supermicro Main Business Overview

13.4.5 Supermicro Latest Developments

13.5 Dell Technologies

13.5.1 Dell Technologies Company Information

13.5.2 Dell Technologies Advanced Cooling Server Product Portfolios and Specifications

13.5.3 Dell Technologies Advanced Cooling Server Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Dell Technologies Main Business Overview

13.5.5 Dell Technologies Latest Developments

13.6 Wiwynn

13.6.1 Wiwynn Company Information

- 13.6.2 Wiwynn Advanced Cooling Server Product Portfolios and Specifications
- 13.6.3 Wiwynn Advanced Cooling Server Sales, Revenue, Price and Gross Margin
(2021-2026)
- 13.6.4 Wiwynn Main Business Overview
- 13.6.5 Wiwynn Latest Developments
- 13.7 Pegatron
 - 13.7.1 Pegatron Company Information
 - 13.7.2 Pegatron Advanced Cooling Server Product Portfolios and Specifications
 - 13.7.3 Pegatron Advanced Cooling Server Sales, Revenue, Price and Gross Margin
(2021-2026)
 - 13.7.4 Pegatron Main Business Overview
 - 13.7.5 Pegatron Latest Developments
- 13.8 HPE
 - 13.8.1 HPE Company Information
 - 13.8.2 HPE Advanced Cooling Server Product Portfolios and Specifications
 - 13.8.3 HPE Advanced Cooling Server Sales, Revenue, Price and Gross Margin
(2021-2026)
 - 13.8.4 HPE Main Business Overview
 - 13.8.5 HPE Latest Developments
- 13.9 Lenovo
 - 13.9.1 Lenovo Company Information
 - 13.9.2 Lenovo Advanced Cooling Server Product Portfolios and Specifications
 - 13.9.3 Lenovo Advanced Cooling Server Sales, Revenue, Price and Gross Margin
(2021-2026)
 - 13.9.4 Lenovo Main Business Overview
 - 13.9.5 Lenovo Latest Developments
- 13.10 xFusion
 - 13.10.1 xFusion Company Information
 - 13.10.2 xFusion Advanced Cooling Server Product Portfolios and Specifications
 - 13.10.3 xFusion Advanced Cooling Server Sales, Revenue, Price and Gross Margin
(2021-2026)
 - 13.10.4 xFusion Main Business Overview
 - 13.10.5 xFusion Latest Developments
- 13.11 Huawei
 - 13.11.1 Huawei Company Information
 - 13.11.2 Huawei Advanced Cooling Server Product Portfolios and Specifications
 - 13.11.3 Huawei Advanced Cooling Server Sales, Revenue, Price and Gross Margin
(2021-2026)
 - 13.11.4 Huawei Main Business Overview

13.11.5 Huawei Latest Developments

13.12 ASUS

13.12.1 ASUS Company Information

13.12.2 ASUS Advanced Cooling Server Product Portfolios and Specifications

13.12.3 ASUS Advanced Cooling Server Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 ASUS Main Business Overview

13.12.5 ASUS Latest Developments

13.13 GIGABYTE

13.13.1 GIGABYTE Company Information

13.13.2 GIGABYTE Advanced Cooling Server Product Portfolios and Specifications

13.13.3 GIGABYTE Advanced Cooling Server Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 GIGABYTE Main Business Overview

13.13.5 GIGABYTE Latest Developments

13.14 H3C

13.14.1 H3C Company Information

13.14.2 H3C Advanced Cooling Server Product Portfolios and Specifications

13.14.3 H3C Advanced Cooling Server Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 H3C Main Business Overview

13.14.5 H3C Latest Developments

13.15 Aivres

13.15.1 Aivres Company Information

13.15.2 Aivres Advanced Cooling Server Product Portfolios and Specifications

13.15.3 Aivres Advanced Cooling Server Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Aivres Main Business Overview

13.15.5 Aivres Latest Developments

13.16 Inspur

13.16.1 Inspur Company Information

13.16.2 Inspur Advanced Cooling Server Product Portfolios and Specifications

13.16.3 Inspur Advanced Cooling Server Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 Inspur Main Business Overview

13.16.5 Inspur Latest Developments

13.17 Sanmina

13.17.1 Sanmina Company Information

13.17.2 Sanmina Advanced Cooling Server Product Portfolios and Specifications

13.17.3 Sanmina Advanced Cooling Server Sales, Revenue, Price and Gross Margin
(2021-2026)

13.17.4 Sanmina Main Business Overview

13.17.5 Sanmina Latest Developments

13.18 Eviden

13.18.1 Eviden Company Information

13.18.2 Eviden Advanced Cooling Server Product Portfolios and Specifications

13.18.3 Eviden Advanced Cooling Server Sales, Revenue, Price and Gross Margin
(2021-2026)

13.18.4 Eviden Main Business Overview

13.18.5 Eviden Latest Developments

13.19 Fujitsu

13.19.1 Fujitsu Company Information

13.19.2 Fujitsu Advanced Cooling Server Product Portfolios and Specifications

13.19.3 Fujitsu Advanced Cooling Server Sales, Revenue, Price and Gross Margin
(2021-2026)

13.19.4 Fujitsu Main Business Overview

13.19.5 Fujitsu Latest Developments

13.20 Nettrix

13.20.1 Nettrix Company Information

13.20.2 Nettrix Advanced Cooling Server Product Portfolios and Specifications

13.20.3 Nettrix Advanced Cooling Server Sales, Revenue, Price and Gross Margin
(2021-2026)

13.20.4 Nettrix Main Business Overview

13.20.5 Nettrix Latest Developments

13.21 Sugon

13.21.1 Sugon Company Information

13.21.2 Sugon Advanced Cooling Server Product Portfolios and Specifications

13.21.3 Sugon Advanced Cooling Server Sales, Revenue, Price and Gross Margin
(2021-2026)

13.21.4 Sugon Main Business Overview

13.21.5 Sugon Latest Developments

13.22 NEC

13.22.1 NEC Company Information

13.22.2 NEC Advanced Cooling Server Product Portfolios and Specifications

13.22.3 NEC Advanced Cooling Server Sales, Revenue, Price and Gross Margin
(2021-2026)

13.22.4 NEC Main Business Overview

13.22.5 NEC Latest Developments

13.23 2CRSi

13.23.1 2CRSi Company Information

13.23.2 2CRSi Advanced Cooling Server Product Portfolios and Specifications

13.23.3 2CRSi Advanced Cooling Server Sales, Revenue, Price and Gross Margin
(2021-2026)

13.23.4 2CRSi Main Business Overview

13.23.5 2CRSi Latest Developments

13.24 AMAX

13.24.1 AMAX Company Information

13.24.2 AMAX Advanced Cooling Server Product Portfolios and Specifications

13.24.3 AMAX Advanced Cooling Server Sales, Revenue, Price and Gross Margin
(2021-2026)

13.24.4 AMAX Main Business Overview

13.24.5 AMAX Latest Developments

13.25 MiTAC

13.25.1 MiTAC Company Information

13.25.2 MiTAC Advanced Cooling Server Product Portfolios and Specifications

13.25.3 MiTAC Advanced Cooling Server Sales, Revenue, Price and Gross Margin
(2021-2026)

13.25.4 MiTAC Main Business Overview

13.25.5 MiTAC Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Advanced Cooling Server Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Advanced Cooling Server Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Cold Plate Liquid Cooling

Table 4. Major Players of Immersion Liquid Cooling

Table 5. Major Players of Spray Liquid Cooling

Table 6. Major Players of Others

Table 7. Global Advanced Cooling Server Sales by Type (2021-2026) & (K Units)

Table 8. Global Advanced Cooling Server Sales Market Share by Type (2021-2026)

Table 9. Global Advanced Cooling Server Revenue by Type (2021-2026) & (\$ million)

Table 10. Global Advanced Cooling Server Revenue Market Share by Type (2021-2026)

Table 11. Global Advanced Cooling Server Sale Price by Type (2021-2026) & (US\$/Unit)

Table 12. Major Players of Water-Based Coolant

Table 13. Major Players of Mineral Oil

Table 14. Major Players of Fluorinated Fluid

Table 15. Major Players of Others

Table 16. Global Advanced Cooling Server Sales by Cooling Medium (2021-2026) & (K Units)

Table 17. Global Advanced Cooling Server Sales Market Share by Cooling Medium (2021-2026)

Table 18. Global Advanced Cooling Server Revenue by Cooling Medium (2021-2026) & (\$ million)

Table 19. Global Advanced Cooling Server Revenue Market Share by Cooling Medium (2021-2026)

Table 20. Global Advanced Cooling Server Sale Price by Cooling Medium (2021-2026) & (US\$/Unit)

Table 21. Major Players of Low Power Density: ≤ 30 kW/Rack

Table 22. Major Players of Medium Power Density: 30-60 kW/Rack

Table 23. Major Players of High Power Density: 60-100 kW/Rack

Table 24. Major Players of Ultra-High Power Density: 100-200 kW/Rack

Table 25. Major Players of Extreme Power Density: ≥ 200 kW/Rack

Table 26. Global Advanced Cooling Server Sales by Power Density Per Cabinet

(2021-2026) & (K Units)

Table 27. Global Advanced Cooling Server Sales Market Share by Power Density Per Cabinet (2021-2026)

Table 28. Global Advanced Cooling Server Revenue by Power Density Per Cabinet (2021-2026) & (\$ million)

Table 29. Global Advanced Cooling Server Revenue Market Share by Power Density Per Cabinet (2021-2026)

Table 30. Global Advanced Cooling Server Sale Price by Power Density Per Cabinet (2021-2026) & (US\$/Unit)

Table 31. Global Advanced Cooling Server Sale by Application (2021-2026) & (K Units)

Table 32. Global Advanced Cooling Server Sale Market Share by Application (2021-2026)

Table 33. Global Advanced Cooling Server Revenue by Application (2021-2026) & (\$ million)

Table 34. Global Advanced Cooling Server Revenue Market Share by Application (2021-2026)

Table 35. Global Advanced Cooling Server Sale Price by Application (2021-2026) & (US\$/Unit)

Table 36. Global Advanced Cooling Server Sales by Company (2021-2026) & (K Units)

Table 37. Global Advanced Cooling Server Sales Market Share by Company (2021-2026)

Table 38. Global Advanced Cooling Server Revenue by Company (2021-2026) & (\$ millions)

Table 39. Global Advanced Cooling Server Revenue Market Share by Company (2021-2026)

Table 40. Global Advanced Cooling Server Sale Price by Company (2021-2026) & (US\$/Unit)

Table 41. Key Manufacturers Advanced Cooling Server Producing Area Distribution and Sales Area

Table 42. Players Advanced Cooling Server Products Offered

Table 43. Advanced Cooling Server Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 44. New Products and Potential Entrants

Table 45. Market M&A Activity & Strategy

Table 46. Global Advanced Cooling Server Sales by Geographic Region (2021-2026) & (K Units)

Table 47. Global Advanced Cooling Server Sales Market Share Geographic Region (2021-2026)

Table 48. Global Advanced Cooling Server Revenue by Geographic Region

(2021-2026) & (\$ millions)

Table 49. Global Advanced Cooling Server Revenue Market Share by Geographic Region (2021-2026)

Table 50. Global Advanced Cooling Server Sales by Country/Region (2021-2026) & (K Units)

Table 51. Global Advanced Cooling Server Sales Market Share by Country/Region (2021-2026)

Table 52. Global Advanced Cooling Server Revenue by Country/Region (2021-2026) & (\$ millions)

Table 53. Global Advanced Cooling Server Revenue Market Share by Country/Region (2021-2026)

Table 54. Americas Advanced Cooling Server Sales by Country (2021-2026) & (K Units)

Table 55. Americas Advanced Cooling Server Sales Market Share by Country (2021-2026)

Table 56. Americas Advanced Cooling Server Revenue by Country (2021-2026) & (\$ millions)

Table 57. Americas Advanced Cooling Server Sales by Type (2021-2026) & (K Units)

Table 58. Americas Advanced Cooling Server Sales by Application (2021-2026) & (K Units)

Table 59. APAC Advanced Cooling Server Sales by Region (2021-2026) & (K Units)

Table 60. APAC Advanced Cooling Server Sales Market Share by Region (2021-2026)

Table 61. APAC Advanced Cooling Server Revenue by Region (2021-2026) & (\$ millions)

Table 62. APAC Advanced Cooling Server Sales by Type (2021-2026) & (K Units)

Table 63. APAC Advanced Cooling Server Sales by Application (2021-2026) & (K Units)

Table 64. Europe Advanced Cooling Server Sales by Country (2021-2026) & (K Units)

Table 65. Europe Advanced Cooling Server Revenue by Country (2021-2026) & (\$ millions)

Table 66. Europe Advanced Cooling Server Sales by Type (2021-2026) & (K Units)

Table 67. Europe Advanced Cooling Server Sales by Application (2021-2026) & (K Units)

Table 68. Middle East & Africa Advanced Cooling Server Sales by Country (2021-2026) & (K Units)

Table 69. Middle East & Africa Advanced Cooling Server Revenue Market Share by Country (2021-2026)

Table 70. Middle East & Africa Advanced Cooling Server Sales by Type (2021-2026) & (K Units)

Table 71. Middle East & Africa Advanced Cooling Server Sales by Application (2021-2026) & (K Units)

Table 72. Key Market Drivers & Growth Opportunities of Advanced Cooling Server
Table 73. Key Market Challenges & Risks of Advanced Cooling Server
Table 74. Key Industry Trends of Advanced Cooling Server
Table 75. Advanced Cooling Server Raw Material
Table 76. Key Suppliers of Raw Materials
Table 77. Advanced Cooling Server Distributors List
Table 78. Advanced Cooling Server Customer List
Table 79. Global Advanced Cooling Server Sales Forecast by Region (2027-2032) & (K Units)
Table 80. Global Advanced Cooling Server Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 81. Americas Advanced Cooling Server Sales Forecast by Country (2027-2032) & (K Units)
Table 82. Americas Advanced Cooling Server Annual Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 83. APAC Advanced Cooling Server Sales Forecast by Region (2027-2032) & (K Units)
Table 84. APAC Advanced Cooling Server Annual Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 85. Europe Advanced Cooling Server Sales Forecast by Country (2027-2032) & (K Units)
Table 86. Europe Advanced Cooling Server Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 87. Middle East & Africa Advanced Cooling Server Sales Forecast by Country (2027-2032) & (K Units)
Table 88. Middle East & Africa Advanced Cooling Server Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 89. Global Advanced Cooling Server Sales Forecast by Type (2027-2032) & (K Units)
Table 90. Global Advanced Cooling Server Revenue Forecast by Type (2027-2032) & (\$ millions)
Table 91. Global Advanced Cooling Server Sales Forecast by Application (2027-2032) & (K Units)
Table 92. Global Advanced Cooling Server Revenue Forecast by Application (2027-2032) & (\$ millions)
Table 93. NVIDIA Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors
Table 94. NVIDIA Advanced Cooling Server Product Portfolios and Specifications
Table 95. NVIDIA Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price

(US\$/Unit) and Gross Margin (2021-2026)

Table 96. NVIDIA Main Business

Table 97. NVIDIA Latest Developments

Table 98. Foxconn Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors

Table 99. Foxconn Advanced Cooling Server Product Portfolios and Specifications

Table 100. Foxconn Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 101. Foxconn Main Business

Table 102. Foxconn Latest Developments

Table 103. Quanta Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors

Table 104. Quanta Advanced Cooling Server Product Portfolios and Specifications

Table 105. Quanta Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 106. Quanta Main Business

Table 107. Quanta Latest Developments

Table 108. Supermicro Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors

Table 109. Supermicro Advanced Cooling Server Product Portfolios and Specifications

Table 110. Supermicro Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 111. Supermicro Main Business

Table 112. Supermicro Latest Developments

Table 113. Dell Technologies Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors

Table 114. Dell Technologies Advanced Cooling Server Product Portfolios and Specifications

Table 115. Dell Technologies Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 116. Dell Technologies Main Business

Table 117. Dell Technologies Latest Developments

Table 118. Wiyynn Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors

Table 119. Wiyynn Advanced Cooling Server Product Portfolios and Specifications

Table 120. Wiyynn Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 121. Wiyynn Main Business

Table 122. Wiyynn Latest Developments

Table 123. Pegatron Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors
Table 124. Pegatron Advanced Cooling Server Product Portfolios and Specifications
Table 125. Pegatron Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 126. Pegatron Main Business
Table 127. Pegatron Latest Developments
Table 128. HPE Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors
Table 129. HPE Advanced Cooling Server Product Portfolios and Specifications
Table 130. HPE Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 131. HPE Main Business
Table 132. HPE Latest Developments
Table 133. Lenovo Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors
Table 134. Lenovo Advanced Cooling Server Product Portfolios and Specifications
Table 135. Lenovo Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 136. Lenovo Main Business
Table 137. Lenovo Latest Developments
Table 138. xFusion Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors
Table 139. xFusion Advanced Cooling Server Product Portfolios and Specifications
Table 140. xFusion Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 141. xFusion Main Business
Table 142. xFusion Latest Developments
Table 143. Huawei Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors
Table 144. Huawei Advanced Cooling Server Product Portfolios and Specifications
Table 145. Huawei Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 146. Huawei Main Business
Table 147. Huawei Latest Developments
Table 148. ASUS Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors
Table 149. ASUS Advanced Cooling Server Product Portfolios and Specifications
Table 150. ASUS Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price

(US\$/Unit) and Gross Margin (2021-2026)

Table 151. ASUS Main Business

Table 152. ASUS Latest Developments

Table 153. GIGABYTE Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors

Table 154. GIGABYTE Advanced Cooling Server Product Portfolios and Specifications

Table 155. GIGABYTE Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 156. GIGABYTE Main Business

Table 157. GIGABYTE Latest Developments

Table 158. H3C Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors

Table 159. H3C Advanced Cooling Server Product Portfolios and Specifications

Table 160. H3C Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 161. H3C Main Business

Table 162. H3C Latest Developments

Table 163. Aivres Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors

Table 164. Aivres Advanced Cooling Server Product Portfolios and Specifications

Table 165. Aivres Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 166. Aivres Main Business

Table 167. Aivres Latest Developments

Table 168. Inspur Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors

Table 169. Inspur Advanced Cooling Server Product Portfolios and Specifications

Table 170. Inspur Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 171. Inspur Main Business

Table 172. Inspur Latest Developments

Table 173. Sanmina Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors

Table 174. Sanmina Advanced Cooling Server Product Portfolios and Specifications

Table 175. Sanmina Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 176. Sanmina Main Business

Table 177. Sanmina Latest Developments

Table 178. Eviden Basic Information, Advanced Cooling Server Manufacturing Base,

Sales Area and Its Competitors

Table 179. Eviden Advanced Cooling Server Product Portfolios and Specifications

Table 180. Eviden Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 181. Eviden Main Business

Table 182. Eviden Latest Developments

Table 183. Fujitsu Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors

Table 184. Fujitsu Advanced Cooling Server Product Portfolios and Specifications

Table 185. Fujitsu Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 186. Fujitsu Main Business

Table 187. Fujitsu Latest Developments

Table 188. Nettrix Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors

Table 189. Nettrix Advanced Cooling Server Product Portfolios and Specifications

Table 190. Nettrix Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 191. Nettrix Main Business

Table 192. Nettrix Latest Developments

Table 193. Sugon Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors

Table 194. Sugon Advanced Cooling Server Product Portfolios and Specifications

Table 195. Sugon Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 196. Sugon Main Business

Table 197. Sugon Latest Developments

Table 198. NEC Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors

Table 199. NEC Advanced Cooling Server Product Portfolios and Specifications

Table 200. NEC Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 201. NEC Main Business

Table 202. NEC Latest Developments

Table 203. 2CRSi Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors

Table 204. 2CRSi Advanced Cooling Server Product Portfolios and Specifications

Table 205. 2CRSi Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 206. 2CRSi Main Business

Table 207. 2CRSi Latest Developments

Table 208. AMAX Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors

Table 209. AMAX Advanced Cooling Server Product Portfolios and Specifications

Table 210. AMAX Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 211. AMAX Main Business

Table 212. AMAX Latest Developments

Table 213. MiTAC Basic Information, Advanced Cooling Server Manufacturing Base, Sales Area and Its Competitors

Table 214. MiTAC Advanced Cooling Server Product Portfolios and Specifications

Table 215. MiTAC Advanced Cooling Server Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 216. MiTAC Main Business

Table 217. MiTAC Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Advanced Cooling Server
- Figure 2. Advanced Cooling Server Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Advanced Cooling Server Sales Growth Rate 2021-2032 (K Units)
- Figure 7. Global Advanced Cooling Server Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Advanced Cooling Server Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Advanced Cooling Server Sales Market Share by Country/Region (2025)
- Figure 10. Advanced Cooling Server Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Cold Plate Liquid Cooling
- Figure 12. Product Picture of Immersion Liquid Cooling
- Figure 13. Product Picture of Spray Liquid Cooling
- Figure 14. Product Picture of Others
- Figure 15. Global Advanced Cooling Server Sales Market Share by Type in 2026
- Figure 16. Global Advanced Cooling Server Revenue Market Share by Type (2021-2026)
- Figure 17. Product Picture of Water-Based Coolant
- Figure 18. Product Picture of Mineral Oil
- Figure 19. Product Picture of Fluorinated Fluid
- Figure 20. Product Picture of Others
- Figure 21. Global Advanced Cooling Server Sales Market Share by Cooling Medium in 2026
- Figure 22. Global Advanced Cooling Server Revenue Market Share by Cooling Medium (2021-2026)
- Figure 23. Product Picture of Low Power Density: ≤ 30 kW/Rack
- Figure 24. Product Picture of Medium Power Density: 30-60 kW/Rack
- Figure 25. Product Picture of High Power Density: 60-100 kW/Rack
- Figure 26. Product Picture of Ultra-High Power Density: 100-200 kW/Rack
- Figure 27. Product Picture of Extreme Power Density: ≥ 200 kW/Rack
- Figure 28. Global Advanced Cooling Server Sales Market Share by Power Density Per Cabinet in 2026

Figure 29. Global Advanced Cooling Server Revenue Market Share by Power Density Per Cabinet (2021-2026)

Figure 30. Advanced Cooling Server Consumed in Artificial Intelligence and Deep Learning

Figure 31. Global Advanced Cooling Server Market: Artificial Intelligence and Deep Learning (2021-2026) & (K Units)

Figure 32. Advanced Cooling Server Consumed in Cloud Computing and Hyperscale Data Centers

Figure 33. Global Advanced Cooling Server Market: Cloud Computing and Hyperscale Data Centers (2021-2026) & (K Units)

Figure 34. Advanced Cooling Server Consumed in High-Performance Computing and Supercomputing Centers

Figure 35. Global Advanced Cooling Server Market: High-Performance Computing and Supercomputing Centers (2021-2026) & (K Units)

Figure 36. Advanced Cooling Server Consumed in Others

Figure 37. Global Advanced Cooling Server Market: Others (2021-2026) & (K Units)

Figure 38. Global Advanced Cooling Server Sale Market Share by Application (2025)

Figure 39. Global Advanced Cooling Server Revenue Market Share by Application in 2025

Figure 40. Advanced Cooling Server Sales by Company in 2025 (K Units)

Figure 41. Global Advanced Cooling Server Sales Market Share by Company in 2025

Figure 42. Advanced Cooling Server Revenue by Company in 2025 (\$ millions)

Figure 43. Global Advanced Cooling Server Revenue Market Share by Company in 2025

Figure 44. Global Advanced Cooling Server Sales Market Share by Geographic Region (2021-2026)

Figure 45. Global Advanced Cooling Server Revenue Market Share by Geographic Region in 2025

Figure 46. Americas Advanced Cooling Server Sales 2021-2026 (K Units)

Figure 47. Americas Advanced Cooling Server Revenue 2021-2026 (\$ millions)

Figure 48. APAC Advanced Cooling Server Sales 2021-2026 (K Units)

Figure 49. APAC Advanced Cooling Server Revenue 2021-2026 (\$ millions)

Figure 50. Europe Advanced Cooling Server Sales 2021-2026 (K Units)

Figure 51. Europe Advanced Cooling Server Revenue 2021-2026 (\$ millions)

Figure 52. Middle East & Africa Advanced Cooling Server Sales 2021-2026 (K Units)

Figure 53. Middle East & Africa Advanced Cooling Server Revenue 2021-2026 (\$ millions)

Figure 54. Americas Advanced Cooling Server Sales Market Share by Country in 2025

Figure 55. Americas Advanced Cooling Server Revenue Market Share by Country

(2021-2026)

Figure 56. Americas Advanced Cooling Server Sales Market Share by Type

(2021-2026)

Figure 57. Americas Advanced Cooling Server Sales Market Share by Application

(2021-2026)

Figure 58. United States Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 59. Canada Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 60. Mexico Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 61. Brazil Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 62. APAC Advanced Cooling Server Sales Market Share by Region in 2025

Figure 63. APAC Advanced Cooling Server Revenue Market Share by Region (2021-2026)

Figure 64. APAC Advanced Cooling Server Sales Market Share by Type (2021-2026)

Figure 65. APAC Advanced Cooling Server Sales Market Share by Application (2021-2026)

Figure 66. China Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 67. Japan Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 68. South Korea Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 69. Southeast Asia Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 70. India Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 71. Australia Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 72. China Taiwan Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 73. Europe Advanced Cooling Server Sales Market Share by Country in 2025

Figure 74. Europe Advanced Cooling Server Revenue Market Share by Country (2021-2026)

Figure 75. Europe Advanced Cooling Server Sales Market Share by Type (2021-2026)

Figure 76. Europe Advanced Cooling Server Sales Market Share by Application (2021-2026)

Figure 77. Germany Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 78. France Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 79. UK Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 80. Italy Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 81. Russia Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 82. Middle East & Africa Advanced Cooling Server Sales Market Share by Country (2021-2026)

Figure 83. Middle East & Africa Advanced Cooling Server Sales Market Share by Type (2021-2026)

Figure 84. Middle East & Africa Advanced Cooling Server Sales Market Share by Application (2021-2026)

Figure 85. Egypt Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 86. South Africa Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 87. Israel Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 88. Turkey Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 89. GCC Countries Advanced Cooling Server Revenue Growth 2021-2026 (\$ millions)

Figure 90. Manufacturing Cost Structure Analysis of Advanced Cooling Server in 2026

Figure 91. Manufacturing Process Analysis of Advanced Cooling Server

Figure 92. Industry Chain Structure of Advanced Cooling Server

Figure 93. Channels of Distribution

Figure 94. Global Advanced Cooling Server Sales Market Forecast by Region (2027-2032)

Figure 95. Global Advanced Cooling Server Revenue Market Share Forecast by Region (2027-2032)

Figure 96. Global Advanced Cooling Server Sales Market Share Forecast by Type (2027-2032)

Figure 97. Global Advanced Cooling Server Revenue Market Share Forecast by Type (2027-2032)

Figure 98. Global Advanced Cooling Server Sales Market Share Forecast by Application (2027-2032)

Figure 99. Global Advanced Cooling Server Revenue Market Share Forecast by Application (2027-2032)

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