

# Global AI Data Center Direct to Chip Cooling Market Growth (Status and Outlook) 2026-2032

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## Abstracts

The global AI Data Center Direct to Chip Cooling market size is predicted to grow from US\$ 1183 million in 2025 to US\$ 7148 million in 2032; it is expected to grow at a CAGR of 30.8% from 2026 to 2032.

AI Data Center Direct to Chip Cooling is a liquid cooling technology in which cold plates are mounted directly on GPUs, CPUs, AI accelerators, memory modules, or other high-power electronic components, allowing coolant to flow inside the cold plates and remove heat from the chips efficiently. Compared with traditional air cooling, this technology offers higher cooling efficiency and better support for high-density deployment, making it especially suitable for AI training servers, inference servers, HPC clusters, and high-power rack environments. A typical system includes cold plates, liquid cooling pipes, quick connectors, CDUs, secondary cooling water loops, pump and valve assemblies, and leak detection devices, making it one of the key technical routes for efficient thermal management and energy reduction in AI data centers.

The rapid increase in rack power density in AI data centers is the key driver for the Direct to Chip Cooling market. As GPUs, AI accelerators, high-performance CPUs, and switching chips continue to consume more power, traditional air cooling is approaching its limits in thermal efficiency, energy consumption, and space utilization. Direct-to-chip liquid cooling places cold plates close to high-heat-flux chips and removes heat efficiently through liquid circulation, helping reduce PUE, improve server stability, and support higher-density AI cluster deployment. As a result, it is becoming an important cooling solution for hyperscale cloud providers, AI computing centers, and high-performance computing data centers.

The main restraints for the AI data center direct-to-chip cooling market are high upfront

investment, system complexity, and the lack of fully unified operation and maintenance standards. Compared with traditional air cooling, direct-to-chip cooling requires cold plates, CDUs, liquid cooling pipelines, quick connectors, leak detection systems, secondary water loops, and deep integration with server racks. This raises higher requirements for data center design, construction, and maintenance capabilities. In addition, retrofitting existing data centers can be difficult, while interface standards, reliability validation, and responsibility boundaries among server OEMs, liquid cooling suppliers, and data center operators still need further maturity, limiting rapid large-scale adoption.

The continuous growth of AI computing demand will create significant opportunities for the Direct to Chip Cooling market. As large model training, inference clusters, AI servers, HPC systems, and edge AI data centers expand, more newly built facilities are expected to adopt liquid cooling architecture from the design stage. This will drive demand for cold plates, CDUs, liquid cooling pipes, pumps, valves, heat exchangers, leak detection systems, and related operation and maintenance services. In addition, stronger policy requirements for green data centers, energy efficiency, and low-carbon infrastructure will further promote the penetration of liquid cooling from high-end AI data centers into enterprise, cloud computing, and regional computing center applications.

The AI Data Center Direct to Chip Cooling market refers to the market for cooling solutions used in artificial intelligence data centers, high-performance computing facilities, and high-density cloud data centers, including cold plates, liquid cooling pipes, CDUs, pumps, valves, heat exchangers, and monitoring systems for GPUs, CPUs, AI accelerators, and other high-power chips. As AI server power consumption and rack power density continue to rise, traditional air cooling is becoming less capable of handling high-heat-flux chips. Direct to chip cooling transfers heat directly from the chip or key heat-generating components to a liquid circulation system through cold plates, improving cooling efficiency, reducing energy consumption, and enabling higher-density deployment. In the future, the market is expected to benefit from large model training, AI inference clusters, green data center construction, and liquid cooling standardization, with adoption expanding from leading cloud providers and supercomputing centers to broader enterprise AI data centers.

LPI (LP Information)' newest research report, the 'AI Data Center Direct to Chip Cooling Industry Forecast' looks at past sales and reviews total world AI Data Center Direct to Chip Cooling sales in 2025, providing a comprehensive analysis by region and market sector of projected AI Data Center Direct to Chip Cooling sales for 2026 through 2032. With AI Data Center Direct to Chip Cooling sales broken down by region, market

sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world AI Data Center Direct to Chip Cooling industry.

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AI Data Center Direct to Chip Cooling 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 AI Data Center Direct to Chip Cooling.

This report presents a comprehensive overview, market shares, and growth opportunities of AI Data Center Direct to Chip Cooling market by product type, application, key players and key regions and countries.

#### Segmentation by Type:

Water-based Coolant Direct Cooling

Non-water-based Coolant Direct Cooling

#### Segmentation by System Architecture:

Server-grade Direct Cooling System

Rack-level Direct Cooling System

Other

### Segmentation by Cold Plate Heat Exchange Method:

Single-phase Cold Plate Direct Cooling

Two-phase Cold Plate Direct Cooling

### Segmentation by Application:

Cloud Data Centers

AI Data Centers / AI Servers

High-Performance Computing (HPC)

Enterprise Data 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 analyzing the company's coverage, product portfolio, its market penetration.

Vertiv

nVent

Lenovo

Supermicro

Schneider Electric

Flex Ltd.

CoolIT System

Modine

DCX Liquid Cooling Systems

Inspur

Malico

ZutaCore

Chilldyne

Accelsius

Delta Power Solutions

Stulz

Iceotope Precision Liquid Cooling

Iceotope

BOYD

Wiwynn Corporation

Kaori

Rittal GmbH & Co. KG

LiquidStack

Taisol Electronics

Quanta

Shenzhen Green Cloud Map Technology

Goaland Energy Conservation Tech

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