

Global AI Datacenter Liquid Cooling Market Growth 2026-2032

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Abstracts

The global AI Datacenter Liquid Cooling market size is predicted to grow from US\$ 5380 million in 2025 to US\$ 16464 million in 2032; it is expected to grow at a CAGR of 17.1% from 2026 to 2032.

AI datacenter liquid cooling refers to thermal management systems that use liquid as the heat transfer medium to remove heat from high-power computing components?primarily GPUs, TPUs, and AI accelerators?in artificial intelligence data centers. Unlike traditional air cooling, which reaches physical limits at approximately 41.3kW per rack, liquid cooling leverages superior thermodynamic properties (specific heat capacity 3-4x higher than air) to manage thermal densities exceeding 100kW per rack. Key technologies include direct-to-chip cold plate cooling, immersion cooling (single-phase and two-phase), and spray cooling. From a value chain perspective, upstream includes coolant distribution units (CDUs), cold plates, manifolds, coolant fluids (dielectric fluorinated fluids), pumps, connectors, and heat exchangers; midstream involves liquid cooling solution integration (cooling loop design, rack-level distribution, thermal simulation), provided by solution vendors, server OEMs, and datacenter infrastructure builders; downstream demand spans hyperscale data centers (AWS, Google, Microsoft, Meta), colocation providers, AI training clusters, and enterprise AI infrastructure. In 2025, the average selling price is approximately US\$2,800 per kW, global installed capacity is about 1,964 MW, and gross margins generally range from 25% to 45%, driven by CDU costs, cold plate precision requirements, coolant fluid prices, and system integration complexity.

United States market for AI Datacenter Liquid Cooling is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for AI Datacenter Liquid Cooling is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for AI Datacenter Liquid Cooling is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key AI Datacenter Liquid Cooling players cover Vertiv Holdings Co., Schneider Electric SE, nVent Electric Plc, CoolIT Systems Inc., Motivair Corporation, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

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

This Insight Report provides a comprehensive analysis of the global AI Datacenter Liquid 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 analyzes the strategies of leading global companies with a focus on AI Datacenter Liquid Cooling portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global AI Datacenter Liquid Cooling market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AI Datacenter Liquid 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 Datacenter Liquid Cooling.

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

Segmentation by Type:

Liquid-to-Air (L2A) Cooling

Liquid-to-Liquid (L2L) Cooling

Segmentation by Power Density:

Medium Density (50-100 kW/rack)

High Density (100-200 kW/rack)

Ultra-High Density (> 200 kW/rack)

Segmentation by Price Tier (Per kW):

Economy / Cold Plate (
Standard / L2A (US\$2,000-3,500/kW)

Premium / Immersion (> US\$3,500/kW)

Segmentation by Application:

Hyperscale Data Centers

Colocation Data Centers

AI Training Clusters

Edge Computing Infrastructure

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.

Vertiv Holdings Co.

Schneider Electric SE

nVent Electric Plc

CoolIT Systems Inc.

Motivair Corporation

Asetek Danmark AS

Iceotope Technologies Ltd.

LiquidStack BV

Boyd Corporation

Delta Electronics Inc.

STULZ GmbH

Rittal GmbH & Co. KG

Dell Technologies Inc.

Hewlett Packard Enterprise Co.

Lenovo Group Ltd.

Super Micro Computer Inc.

Fujitsu Ltd.

Danfoss AS

Chilidyne

Auras Technology Co., Ltd.

AVC (Asia Vital Components)

Cooler Master Co., Ltd.

Envicool

Goaland

Shenling

Key Questions Addressed in this Report

What is the 10-year outlook for the global AI Datacenter Liquid Cooling market?

What factors are driving AI Datacenter Liquid Cooling market growth, globally and by region?

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

How do AI Datacenter Liquid Cooling market opportunities vary by end market size?

How does AI Datacenter Liquid Cooling break out by Type, by Application?

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