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Global AI Liquid Cooling Plate Brazing Furnace Market Growth 2026-2032

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Abstracts

The global AI Liquid Cooling Plate Brazing Furnace market size is predicted to grow from US$ 48.68 million in 2025 to US$ 245 million in 2032; it is expected to grow at a CAGR of 26.1% from 2026 to 2032.

AI Liquid Cooling Plate Brazing Furnace refers to specialized brazing equipment used to manufacture liquid cold plates and related metallic cooling components for AI servers, GPU/CPU accelerated-computing platforms, high-performance computing systems, and high-density data-center direct liquid cooling. The furnace heats assembled copper, aluminum, or other metallic cold-plate components under vacuum or a controlled protective atmosphere, allowing brazing filler materials to form reliable metallurgical joints between cover plates, flow-channel bodies, microchannel structures, fins, fittings, and manifolds. The resulting cold plate must provide high leak tightness, dimensional accuracy, mechanical strength, surface flatness, and thermal performance because it is typically mounted directly onto high-heat-flux processors such as GPUs and CPUs. Compared with general-purpose industrial brazing furnaces, AI cold-plate brazing systems place greater emphasis on temperature uniformity, vacuum cleanliness, joint integrity, deformation control, microchannel protection, and high-volume process repeatability. Major configurations include vacuum brazing furnaces, controlled-atmosphere brazing furnaces, and automated brazing systems incorporating fixtures, material handling, process monitoring, and quality traceability.

Key Findings

In 2025, global AI Liquid Cooling Plate Brazing Furnace production reached approximately 80 units, with an average global market price of around US$630k per unit

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Vacuum brazing is an important route for precision copper and complex AI liquid cold plates

Controlled-atmosphere brazing provides strong scalability for high-volume aluminum cold plate production

China is becoming an important manufacturing base for AI liquid cooling brazing equipment and cold plates

Market Trends

The AI Liquid Cooling Plate Brazing Furnace market is shifting rapidly from general-purpose vacuum furnace applications toward dedicated equipment optimized for AI cold-plate manufacturing. The sharp increase in processor heat density is driving direct-to-chip liquid cooling deeper into AI servers and high-density computing infrastructure, while cold plates are becoming more complex in internal channel geometry, fin structure and thermal interface design. Mitsubishi Heavy Industries and Fujikura both position direct liquid cooling and processor cold plates as key technologies for high-power computing systems, illustrating the structural transition in server thermal management. As a result, furnace suppliers increasingly need to deliver tighter multi-zone temperature control, cleaner vacuum environments, more stable atmosphere management, lower thermal distortion and higher repeatability across large production batches. Dedicated AI cold-plate furnace products are beginning to emerge, and equipment architectures are evolving toward programmable thermal recipes, automatic loading and unloading, process-data recording, helium-leak inspection interfaces and digital quality traceability. The industry is also moving toward greater manufacturing flexibility: a single brazing line may be designed to process multiple advanced thermal products, including cold plates and three-dimensional vapor chambers, allowing customers to improve asset utilization while adapting to rapidly changing processor generations. SECO/WARWICK has already announced a controlled-atmosphere brazing line in China capable of processing both cold plates and 3D vapor chambers, demonstrating this transition toward flexible high-volume thermal-component manufacturing.

Market Dynamics

Drivers

The primary growth driver is the rapid increase in thermal loads generated by AI accelerators, GPUs, CPUs and high-density server systems. Air cooling becomes

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progressively more difficult as processor power density rises, accelerating the transition toward direct-to-chip liquid cooling and increasing demand for cold plates with lower thermal resistance, higher flow efficiency and stronger long-term reliability. Fujikura identifies CPU and GPU heat generation as a major thermal-management challenge in servers, while Eaton has developed high-volume liquid-cooling loops and brazed cold-plate solutions specifically for high-performance computing and cloud architectures. The manufacturing requirements of these components also favor specialized brazing equipment because complex internal flow channels, fins and fittings must be joined while maintaining leak tightness, flatness and structural integrity. At the same time, hyperscale data-center investment and construction of AI computing infrastructure are creating a larger manufacturing base for liquid-cooling components, encouraging cold-plate producers to expand from prototype or low-volume production toward automated and repeatable mass production.

Restraints

The main restraint is that brazing is only one of several joining technologies available for AI liquid cooling plates. Laser welding, friction stir welding, diffusion bonding and mechanically sealed structures can be more suitable for certain materials, geometries and customer requirements. Nidec, for example, applies laser welding to some of its latest GPU-oriented cold plates, illustrating that high-performance AI cold plates do not universally require furnace brazing. This technology competition limits the addressable market for brazing furnaces. In addition, AI cold plates remain highly customized around processor package dimensions, thermal design power, mounting layout, flow resistance and server architecture, making equipment and process qualification relatively complex. Short processor-generation cycles can also force manufacturers to update fixtures, process recipes and production configurations frequently. For equipment suppliers, the project-based nature of furnace sales, long customer validation periods and high expectations for process support can lead to volatile order timing and uneven capacity utilization.

Opportunities

The strongest opportunity lies in the transition of AI liquid cooling from specialized high-performance computing installations toward broader deployment in AI servers and computing centers. As cold-plate production moves toward larger volumes, equipment suppliers can capture additional value through dedicated vacuum brazing furnaces, flexible CAB lines, automated loading systems, customized fixtures, controlled cooling, leak-testing integration and digital production management. Eaton notes that brazed cold plates can integrate customized internal flow paths and fin structures, while

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SECO/WARWICK's recent data-center-related CAB project demonstrates that continuous brazing can extend beyond traditional automotive heat exchangers into advanced electronics cooling. Another opportunity comes from material diversification. Copper remains attractive for high-heat-flux processor cooling because of its thermal conductivity, while aluminum provides advantages in weight, cost and large-scale processing. Suppliers capable of supporting multiple material systems and multiple brazing technologies are therefore better positioned to serve changing customer architectures. Process databases, automatic recipe optimization, remote diagnostics and predictive maintenance also create recurring service opportunities beyond the initial furnace sale.

Challenges

The central technical challenge is maintaining consistent brazing quality on complex AI cold plates while avoiding thermal distortion and internal contamination. Cold plates may contain dense internal channels, fine fins, manifolds and multiple brazed interfaces, so local temperature gradients or inconsistent filler flow can create voids, incomplete joints, deformation or leakage. Dedicated AI cold-plate vacuum furnaces therefore place particular emphasis on multi-zone thermal control, high vacuum stability, low pressure-rise rates and clean furnace environments. Brother Furnace's dedicated AI Liquid Cold Plate Vacuum Brazing Furnace, for example, uses multi-zone heating and high-vacuum systems and specifies leak-tightness and pressure-resistance requirements for finished cold plates. Equipment vendors also face the challenge of scaling production without sacrificing process repeatability. Faster throughput, larger loads and automated handling can introduce new variation in temperature distribution and fixture deformation, while AI customers increasingly demand strict traceability and validation. This pushes furnace suppliers to combine mechanical equipment expertise with brazing metallurgy, thermal simulation, fixture engineering and quality-control capabilities.

Industry Chain Analysis

The upstream industry includes furnace structural materials, heating elements, thermal insulation, vacuum pumps, valves, diffusion or molecular pumping systems, protective-gas equipment, temperature sensors, PLCs, power-control modules, cooling systems, conveyors, fixtures, robots and inspection instruments. The brazing process is also closely linked to copper and aluminum cold-plate materials, brazing alloys, clad sheets and flux systems, because material selection determines the thermal profile, vacuum or atmosphere requirements and suitable furnace architecture. Midstream manufacturers design and produce vacuum brazing furnaces, controlled-atmosphere brazing furnaces

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and related automated lines, with value increasingly shifting toward thermal-process design, temperature uniformity, vacuum cleanliness, distortion control, automation and process software. Downstream customers are AI cold-plate manufacturers, server thermal-module suppliers, liquid-cooling solution providers, electronics manufacturing service companies and component manufacturers serving cloud-computing and data-center customers. Eaton's cold-plate manufacturing portfolio illustrates how machining, stamping, CAB brazing and vacuum brazing can be combined within cold-plate production, while the final value chain extends through leak testing, flow testing, thermal validation and integration into server liquid loops.

Segment Insights

By technology, AI Liquid Cooling Plate Brazing Furnaces can principally be divided into Vacuum Brazing Furnaces and Controlled Atmosphere Brazing Furnaces. Vacuum brazing currently has particularly strong relevance to high-precision AI cold plates because it supports clean joints and complex internal structures and can be adapted to copper, aluminum and other metallic materials. Dedicated AI vacuum brazing furnace products are already commercially offered in China. Brother Furnace lists AI Liquid Cold Plate Vacuum Brazing Furnace as a separate product category, with multiple chamber sizes, multi-zone temperature control and high-vacuum configurations aimed at AI computing, semiconductor and data-center applications. This suggests that AI cold plates are beginning to develop into a distinct equipment application rather than remaining merely a generic vacuum-furnace use case.

Controlled Atmosphere Brazing is particularly relevant to aluminum cold plates where continuous throughput and manufacturing consistency are priorities. Eaton identifies CAB brazing as an established manufacturing method for stamped aluminum cold plates, while SECO/WARWICK has developed continuous CAB equipment serving data-center cold plates and 3D vapor chambers. The two technologies therefore serve complementary parts of the market. Vacuum brazing is more closely associated with high-vacuum cleanliness, flexible batch production and complex precision structures, whereas CAB offers advantages in continuous manufacturing and high-volume aluminum processing. The long-term market is expected to retain both routes rather than converge on a single technology.

Downstream Market Opportunities

The principal downstream opportunity is direct-to-chip liquid cooling for AI servers, where cold plates are mounted directly onto high-heat-generating GPUs, CPUs and

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accelerators. Fujikura provides customizable cold plates for CPUs and GPUs in HPC and server systems, while Mitsubishi Heavy Industries has developed direct-to-chip cooling solutions specifically for high-density data-center computing. Beyond individual processor cold plates, manufacturing demand is expanding toward multi-component cold plates, accelerator-board cooling modules, server liquid loops and related high-density thermal components. As AI server architectures evolve, suppliers are increasingly required to support different processor footprints, heat-source layouts and flow-channel designs. This favors brazing equipment with flexible fixtures, programmable recipes and rapid product changeover. AI computing centers and hyperscale data centers therefore represent not only end-market demand for cold plates but also a major driver of equipment investment throughout the cold-plate manufacturing supply chain.

Regional Insights

China is becoming an important manufacturing and demand center for AI Liquid Cooling Plate Brazing Furnaces because the country combines a large electronics manufacturing base, rapidly expanding AI computing infrastructure, a growing liquid-cooling component industry and an established industrial furnace supply chain. Dedicated AI liquid cold-plate vacuum brazing furnaces are already offered by Chinese furnace manufacturers, while international suppliers are also delivering advanced brazing lines to Chinese thermal-management manufacturers. SECO/WARWICK announced a continuous CAB line for a Chinese thermal-solutions producer specifically capable of manufacturing cold plates for data-center applications, demonstrating that China is developing both domestic and international equipment supply channels. North America remains a major source of demand through hyperscale cloud providers, AI accelerator ecosystems and high-performance computing deployment, while Europe has strengths in industrial thermal-processing equipment and advanced thermal-management engineering. Japan also maintains significant expertise in high-performance cold plates and precision electronics thermal management, represented by companies such as Fujikura and Nidec. Regional competition is therefore shaped by different strengths: China emphasizes manufacturing scale, localized engineering and delivery responsiveness, while established overseas suppliers typically compete through process expertise, equipment reliability and global customer support.

Competitive Landscape Analysis

The AI Liquid Cooling Plate Brazing Furnace market remains relatively fragmented and is still transitioning from a broader vacuum-furnace and aluminum-brazing equipment

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market into a more clearly defined AI-specific equipment segment. In China, Brother Furnace/Bona Thermal has developed dedicated AI Liquid Cold Plate Vacuum Brazing Furnace products for artificial intelligence, semiconductor and high-density data-center applications, with commercially disclosed furnace models and process specifications. SECO/WARWICK represents an important international participant on the controlled-atmosphere brazing side and has demonstrated the ability to supply continuous CAB lines for data-center cold plates and 3D vapor chambers. Competition in this emerging market is increasingly based on furnace temperature uniformity, vacuum cleanliness, process repeatability, thermal-deformation control, fixture design, automation, leak-quality assurance, engineering customization and mass-production support.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global AI Liquid Cooling Plate Brazing Furnace 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 Liquid Cooling Plate Brazing Furnace portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global AI Liquid Cooling Plate Brazing Furnace market.

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

This report presents a comprehensive overview, market shares, and growth

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opportunities of AI Liquid Cooling Plate Brazing Furnace market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Vacuum Brazing Furnace

Atmosphere-Shielded Brazing Furnace

Segmentation by Cold Plate Material:

Copper Liquid Cooling Plate Brazing Furnace

Aluminum Liquid Cooling Plate Brazing Furnace

Stainless Steel Brazing Furnace

Segmentation by Brazing Temperature:

600-700?

700-800?

Others

Segmentation by Application:

AI Server

Computing Center

GPU/CPU Accelerated Computing Platform

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Data Center

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

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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.

SECO/WARWICK

Ipsen Global

Centorr Vacuum Industries

ALD Vacuum

IVA Schmetz

ECM Technologies

Hairong Furnace Industry

Hongda Furnace Industry

Aikexun Vacuum Equipment

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Mingxin Furnace

Hengda Furnace

Sanhe Furnace

SF Furnace

Hengli Eletek

Bona Thermo

SIMUWU Vacuum Furnace

Aojie Super Brazing Manufacturing

Key Questions Addressed in this Report

What is the 10-year outlook for the global AI Liquid Cooling Plate Brazing Furnace market?

What factors are driving AI Liquid Cooling Plate Brazing Furnace market growth, globally and by region?

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

How do AI Liquid Cooling Plate Brazing Furnace market opportunities vary by end market size?

How does AI Liquid Cooling Plate Brazing Furnace break out by Type, by Application?

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