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Global AI Server Liquid Cooling Piping Components Market Growth (Status and Outlook) 2026-2032

https://marketpublishers.com/r/GF10D41D0C7DEN.html
Date: October 2026
Pages: 135
Price: US$ 3,660.00 (Single User License)
ID: GF10D41D0C7DEN

Abstracts

The global AI Server Liquid Cooling Piping Components market size is predicted to grow from US$ 1535 million in 2025 to US$ 3946 million in 2032; it is expected to grow at a CAGR of 14.5% from 2026 to 2032.

AI Server Liquid Cooling Piping Components refer to fluid transmission and connection components used in liquid cooling systems for artificial intelligence servers, high-performance computing (HPC) servers, and high-density data centers. These components enable efficient coolant circulation between cooling distribution units (CDUs), cold plates, manifolds, pumps, heat exchangers, and other thermal management equipment. The product scope mainly covers liquid cooling hoses, rigid piping, quick connectors, pipe fittings, valves, manifolds, sealing components, and related fluid control parts. These components require high pressure resistance, low leakage performance, corrosion resistance, low ion precipitation, thermal reliability, and long-term durability under continuous liquid cooling operation.

Key Findings

AI server liquid cooling piping components are essential infrastructure parts for high-density AI computing thermal management systems

Rack-level and cold plate liquid cooling architectures represent the primary demand areas for piping components

North America leads the high-performance data center liquid cooling component market with strong AI infrastructure investment

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Quick connectors and manifolds are becoming critical components for scalable liquid cooling deployment

Major suppliers compete through reliability, customization capability, and global data center supply chains

Market Trends

The AI Server Liquid Cooling Piping Components market is experiencing rapid technological evolution driven by increasing server power density and the transition from traditional air cooling to advanced liquid cooling solutions. AI accelerator platforms with higher thermal design power requirements are accelerating the adoption of cold plate liquid cooling, rack-level liquid cooling, and customized coolant distribution systems. Future product development is focused on improving connector reliability, reducing leakage risks, enhancing material compatibility with different coolant types, and supporting higher flow rates. Suppliers are increasingly developing integrated piping assemblies combining hoses, manifolds, connectors, and monitoring functions to meet the requirements of hyperscale data centers and AI computing clusters.

Market Dynamics

Drivers

The primary growth drivers include the expansion of artificial intelligence computing infrastructure, increasing deployment of GPU-based servers, rising rack power density, and growing demand for energy-efficient data centers. As conventional air cooling becomes insufficient for next-generation AI servers, liquid cooling systems require higher-performance piping components capable of stable operation under high thermal loads. Government investment in digital infrastructure and hyperscale cloud computing expansion further accelerate adoption.

Restraints

Market development is constrained by high qualification requirements, strict reliability standards, complex integration processes, and limited supplier experience in advanced liquid cooling applications. Component failures such as leakage or contamination can cause significant damage to expensive computing equipment, resulting in demanding certification and testing requirements. The diversity of coolant materials and system architectures also increases product development complexity.

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Opportunities

Future opportunities are concentrated in AI data centers, supercomputing facilities, edge AI infrastructure, and next-generation rack-level cooling systems. The increasing adoption of direct-to-chip cooling and higher-density computing platforms creates demand for advanced quick connectors, high-performance hoses, and customized manifolds. Companies with strong precision manufacturing capabilities, sealing technologies, and thermal management expertise are expected to benefit from market expansion.

Challenges

The industry faces challenges including rapid technology changes, uncertainty in liquid cooling architecture standards, supply chain requirements from global data center operators, and increasing competition among component manufacturers. Maintaining long-term reliability while reducing manufacturing costs and achieving compatibility with emerging cooling technologies will remain critical challenges.Industry Chain Analysis

The industry chain of AI Server Liquid Cooling Piping Components consists of upstream materials and component suppliers, midstream component manufacturers, and downstream system integrators and end users. Upstream suppliers provide engineering plastics, stainless steel, copper alloys, sealing materials, precision machining components, and surface treatment technologies. Midstream manufacturers produce liquid cooling hoses, quick connectors, manifolds, valves, and integrated piping assemblies through precision manufacturing and reliability testing. Downstream markets include AI data centers, cloud service providers, telecommunications operators, government computing centers, healthcare computing platforms, and HPC facilities, where liquid cooling systems are deployed to support high-performance computing operations.

Value Chain Analysis

Value creation in AI server liquid cooling piping components is mainly generated through material engineering, precision manufacturing, reliability validation, and system integration capabilities. Manufacturers with advanced sealing technologies, low-leakage connector designs, and customized engineering services can achieve higher added value. Close cooperation with server manufacturers, liquid cooling solution providers, and data center operators is becoming increasingly important for maintaining

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competitiveness.

Segment Insights

By product type, quick connectors, liquid cooling manifolds, and high-performance hoses represent the core segments of the market because they directly affect coolant circulation efficiency, maintenance convenience, and system reliability. Quick connectors are particularly important for rack-level liquid cooling deployment due to their role in enabling rapid installation and serviceability. By liquid cooling structure, cold plate liquid cooling currently represents the mainstream architecture for AI servers, while rack-level liquid cooling is becoming a fast-growing direction as rack power density increases. Immersion liquid cooling requires specialized piping solutions with stronger coolant compatibility and sealing performance.

Downstream Market Opportunities

The downstream demand for AI server liquid cooling piping components is mainly generated by hyperscale data centers, cloud computing companies, AI infrastructure operators, telecommunications networks, government computing platforms, and research supercomputing centers. AI training clusters and large-scale inference facilities are expected to create significant demand because these applications require continuous operation, high computing density, and reliable thermal management systems. The expansion of enterprise AI adoption will further broaden opportunities beyond traditional data center customers.

Regional Insights

North America represents one of the leading regional markets due to strong AI infrastructure investment, large-scale cloud service providers, and advanced data center development. Europe maintains demand through energy efficiency requirements and sustainable data center initiatives. Asia-Pacific is becoming a major growth region driven by AI server manufacturing capacity, semiconductor ecosystem development, and rapid expansion of digital infrastructure in China, Japan, South Korea, and Taiwan. Regional competition is increasingly focused on localized supply chains, engineering response capabilities, and cooperation with data center ecosystem partners.

Competitive Landscape Analysis

The competitive landscape of AI Server Liquid Cooling Piping Components includes

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global fluid control specialists, thermal management companies, precision component manufacturers, and regional liquid cooling solution providers. Companies such as Parker Hannifin, Gates, Danfoss, Swagelok, Colder Products Company, Nitto Kohki, St?ubli, and Boyd Corporation have strong capabilities in fluid connection technologies and industrial cooling applications. Chinese and Taiwan-based companies including Envicool, Goaland, FRD, Tongfei, Auras, and related precision component suppliers are strengthening their positions through AI data center liquid cooling deployment. Competition is increasingly centered on leakage prevention, connector reliability, customization capability, manufacturing scale, and integration with complete liquid cooling solutions.

Report Scope

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

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

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

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

Market Segmentation

Segmentation by Type:

Liquid Cooling Hose

Quick Connectors

Liquid Cooling Manifolds

Others

Segmentation by Liquid Cooling Structures:

Cold Plate Liquid Cooling

Immersion Liquid Cooling

Rack-Level Liquid Cooling

Segmentation by Application:

Telecommunications

Government

Healthcare

Other

This report also splits the market by region:

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Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

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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.

Parker Hannifin

Gates

Danfoss

Auras

Boyd Corporation

Nitto Kohki

St?ubli

Vertiv

nVent

Colder Products Company

Swagelok

Remindore Technology

Envicool Technology Co., Ltd.

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Guangzhou Goaland Energy Conservation Tech. Co., Ltd

Shenzhen FRD Science & Technology Co., Ltd.

Jonhon Optronic Technology Co., Ltd.

Tongfei Co., Ltd.

Yimikang Tech. Group Co., Ltd.

Zhongding Group

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