

Global Air-Cooled and Dry Heat Rejection Equipment for AI Training Clusters Market Growth 2026-2032

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Abstracts

The global Air-Cooled and Dry Heat Rejection Equipment for AI Training Clusters market size is predicted to grow from US\$ 1810 million in 2025 to US\$ 7433 million in 2032; it is expected to grow at a CAGR of 19.2% from 2026 to 2032.

Air-cooled and dry heat rejection equipment for AI training clusters refers to engineered facility-side cooling equipment and systems that reject heat from AI training clusters, HPC facilities and high-density data centres to the outdoor ambient air. The scope focuses on the primary heat rejection and cooling plant layer, including dry coolers, adiabatic dry coolers, air-cooled fluid coolers, air-cooled chillers with free-cooling functions, outdoor heat rejection modules for liquid-cooling loops, and equipment integrated with CDUs, CRAHs, direct-to-chip cold plates or immersion cooling systems. Key performance parameters include cooling capacity, thermal efficiency, fan power, acoustic performance, footprint, redundancy, free-cooling hours, water-use profile, reliability and modular deployability.

Air-cooled and dry heat rejection equipment for AI training clusters should be understood as a facility-side infrastructure category rather than as a conventional cooling-tower market. The category sits at the intersection of mature HVAC equipment, industrial heat exchangers, precision data-centre cooling and emerging liquid-cooling infrastructure. Its role is to reject heat from AI training workloads, high-density racks, CDUs, chilled-water loops and liquid-cooling circuits to the outdoor ambient environment. As AI clusters move towards higher rack densities and more concentrated thermal loads, the relevant buying criteria are shifting from unit-level cooling capacity alone to system reliability, modularity, water-use profile, free-cooling hours, redundancy, acoustic performance, footprint and speed of deployment.

The global supply structure is layered. Large thermal-management groups such as Johnson Controls, Carrier, Trane, Daikin and Vertiv are positioned around integrated cooling plants, air-cooled chillers, CRAHs, CDUs, controls and global service networks. Specialist heat-rejection manufacturers such as SPX/Marley, BAC, EVAPCO, Kelvion, Alfa Laval, ThermoKey and LU-VE compete through dry coolers, adiabatic coolers, air-fin coolers and industrial heat-exchange know-how. China and Taiwan add a fast-growing regional layer, represented by Envicool, Shenling, Canatal, Midea Building Technologies and Delta Electronics, where local AI computing projects, telecom operators and internet customers are accelerating demand for customised, rapidly deployable cooling systems.

Demand growth is driven by new AI factories, retrofits of existing data centres for liquid-cooled racks, and water-constrained regions seeking alternatives to conventional wet cooling. The rise of direct-to-chip and immersion cooling does not eliminate the need for outdoor heat rejection. Instead, liquid cooling moves heat more efficiently from chips and racks into fluid loops, which then require dry coolers, air-cooled chillers, adiabatic coolers, cooling towers or other external heat sinks. The most important industry transition is therefore not air cooling versus liquid cooling in isolation, but the integration of liquid-cooled IT with efficient, scalable and water-conscious facility-side heat rejection.

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

This Insight Report provides a comprehensive analysis of the global Air-Cooled and Dry Heat Rejection Equipment for AI Training Clusters 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 Air-Cooled and Dry Heat Rejection Equipment for AI Training Clusters portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Air-Cooled and Dry Heat Rejection Equipment for AI Training

Clusters market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Air-Cooled and Dry Heat Rejection Equipment for AI Training Clusters and breaks down the forecast by Heat Rejection Equipment, 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 Air-Cooled and Dry Heat Rejection Equipment for AI Training Clusters.

This report presents a comprehensive overview, market shares, and growth opportunities of Air-Cooled and Dry Heat Rejection Equipment for AI Training Clusters market by product type, application, key manufacturers and key regions and countries.

Segmentation by Heat Rejection Equipment:

Dry Cooler

Adiabatic Dry Cooler

Air-Cooled Chiller

Integrated Outdoor Cooling Module

Segmentation by System Layer:

Primary Heat Rejection

Cooling Plant

Room / Row Interface

Rack / IT Interface

Segmentation by Cooling Mechanism:

Sensible Dry Cooling

Adiabatic-Assisted Cooling

Mechanical Refrigeration

Hybrid Free Cooling

Segmentation by Application:

AI Training Rack

HPC / Supercomputing Rack

Cloud Data-Centre Rack

Telecom / Edge High-Power Rack

Other

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.

Johnson Controls

Carrier Global Corporation

Trane Technologies

Vertiv

SPX Cooling Tech

Baltimore Aircoil Company

EVAPCO

Airedale

Daikin

Kelvion

STULZ

Mitsubishi Electric Hydronics & IT Cooling Systems

Munters

Alfa Laval

ThermoKey

Aermec

Mitsubishi Heavy Industries

Envicool

Shenling

Canatal

Midea Building Technologies

Delta Electronics

Key Questions Addressed in this Report

What is the 10-year outlook for the global Air-Cooled and Dry Heat Rejection Equipment for AI Training Clusters market?

What factors are driving Air-Cooled and Dry Heat Rejection Equipment for AI Training Clusters market growth, globally and by region?

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

How do Air-Cooled and Dry Heat Rejection Equipment for AI Training Clusters market opportunities vary by end market size?

How does Air-Cooled and Dry Heat Rejection Equipment for AI Training Clusters break out by Heat Rejection Equipment, by Application?

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