

Global Cabinet Liquid Cooled Server Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Cabinet Liquid Cooled Server market size is predicted to grow from US\$ 1020 million in 2025 to US\$ 2042 million in 2032; it is expected to grow at a CAGR of 10.6% from 2026 to 2032.

Cabinet Liquid Cooled Server refers to a high-density server system integrated within a rack or cabinet that uses liquid cooling technologies (such as direct-to-chip, immersion, or rear-door heat exchangers) instead of or alongside traditional air cooling to efficiently dissipate heat generated by CPUs, GPUs, and memory in high-performance computing environments, improving energy efficiency, thermal management, and computing density.

The cabinet liquid cooled server industry chain begins upstream with suppliers of semiconductors, server components, cooling fluids, pumps, heat exchangers, and precision manufacturing materials, followed by midstream system integrators and OEMs that design, assemble, and optimize liquid cooling server cabinets and data center solutions, and extends downstream to hyperscale cloud providers, telecom operators, enterprises, and research institutions deploying these systems in data centers, where demand is driven by AI workloads, energy efficiency requirements, and high-density computing needs, supported by service providers offering installation, maintenance, and thermal management optimization solutions.

Globally, numerous projects under construction and planning include hyperscale data centers adopting liquid cooled racks in North America for AI model training clusters, European green data center initiatives integrating immersion cooling systems, large-scale cloud infrastructure expansions in China deploying direct-to-chip liquid cooling cabinets, edge data center pilots in Southeast Asia using compact liquid cooled racks,

government-backed supercomputing facilities in Japan and Europe upgrading to liquid cooling technologies, and enterprise-level deployments in finance and telecom sectors, all aiming to reduce power usage effectiveness, support high-density GPUs, and meet sustainability targets through advanced thermal management solutions.

2025 Global Market Average Gross Profit Margin: 28%.

The cabinet liquid cooled server market is experiencing rapid growth driven by the exponential rise in AI workloads, high-performance computing, and data-intensive applications that exceed the thermal limits of traditional air-cooled systems. Over the past few years, increasing rack power densities—often exceeding 30–80 kW—have made liquid cooling not just an option but a necessity, especially for GPU-intensive environments.

From a regional perspective, North America leads the market due to strong investments by hyperscale cloud providers and AI companies, while China is rapidly scaling deployments through government-backed data center expansion and digital infrastructure policies. Europe is focusing on sustainable and energy-efficient data centers, accelerating adoption of liquid cooling to meet strict environmental regulations.

Market opportunities are substantial, particularly in AI training clusters, edge computing, and green data center transformation, where liquid cooling significantly reduces energy consumption and operational costs. However, risks include high initial capital expenditure, complexity of deployment, concerns over leakage and maintenance, and lack of standardized infrastructure across legacy data centers. Technological trends show a shift toward immersion cooling and two-phase cooling systems, along with increasing integration of intelligent monitoring and automation.

Competitive characteristics of the market are defined by strong participation from server OEMs, cooling technology specialists, and data center solution providers, with differentiation based on thermal efficiency, reliability, and integration capabilities. Strategic partnerships between chip manufacturers, cloud providers, and cooling solution companies are intensifying, indicating a move toward vertically integrated ecosystems and customized high-performance solutions.

LPI (LP Information)'s newest research report, the "Cabinet Liquid Cooled Server Industry Forecast" looks at past sales and reviews total world Cabinet Liquid Cooled Server sales in 2025, providing a comprehensive analysis by region and market sector of projected Cabinet Liquid Cooled Server sales for 2026 through 2032. With Cabinet

Liquid Cooled Server sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Cabinet Liquid Cooled Server industry.

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Cabinet Liquid Cooled Server 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 Cabinet Liquid Cooled Server.

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

Segmentation by Type:

Full Liquid Cooling

Non-Full Liquid Cooling

Segmentation by Structural Type:

Cold Plate Type

Immersion Type

Segmentation by Rack Density:

30 kW per Rack

Segmentation by Application:

Data Center

Cloud Computing

Big Data

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

Dell Technologies

Supermicro

HP

ZTE

PowerLeader

Fusion

Inspur Information

Ningchang

Lenovo

Huawei

New H3C Technologies

BEEHE

NEC Corporation

Schneider Electric

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