

Global Data Center Direct to Chip Cooling Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Data Center Direct to Chip Cooling market size is predicted to grow from US\$ 2633 million in 2025 to US\$ 7512 million in 2032; it is expected to grow at a CAGR of 18.2% from 2026 to 2032.

Data Center Direct-to-Chip Cooling is a liquid cooling solution designed for high-power servers, AI chips, GPUs, CPUs, and accelerator cards. It uses cold plates, microchannel cold plates, liquid cooling loops, and coolant distribution systems to deliver coolant directly to or near the main heat-generating components, enabling efficient heat transfer from high-heat-flux devices. Compared with traditional air cooling, direct-to-chip cooling can handle much higher power density, reduce server inlet temperature and fan energy consumption, improve rack-level power density, and enhance overall data center energy efficiency. It is widely used in AI data centers, cloud computing facilities, high-performance computing, edge computing, and large-scale internet data centers.

The main growth drivers for the Data Center Direct to Chip Cooling market come from the rapid increase in cooling demand from AI servers, HPC, high-density cloud computing, and large-scale model training. As the power consumption of GPUs, CPUs, and AI accelerators continues to rise, traditional air cooling is becoming increasingly limited in terms of heat dissipation efficiency, rack power density, and energy consumption control. Direct-to-chip cooling brings coolant directly to cold plates close to the heat source, enabling higher power density, lower PUE, and more stable chip operating conditions, which is accelerating adoption among hyperscale cloud providers, AI data centers, and supercomputing facilities.

The key restraint for the Data Center Direct to Chip Cooling market is the high system

complexity, relatively high upfront investment, and greater operational requirements. Direct-to-chip cooling requires cold plates, CDUs, piping, connectors, pumps, heat exchangers, and monitoring systems, while also needing deep integration with server architecture, rack layout, facility water loops, and data center maintenance procedures. For traditional data centers, retrofit costs, leakage concerns, technical requirements for maintenance teams, supply chain maturity, and compatibility across different server platforms may slow down large-scale deployment in the short term.

Future opportunities mainly come from new AI data center construction, standardization of liquid-cooled servers, green data center policies, and the continuous increase in chip power consumption. As rack power density moves from tens of kilowatts toward hundreds of kilowatts, direct-to-chip cooling is expected to expand from high-end HPC and AI training environments into cloud computing, internet, financial, telecom, and enterprise data centers. In addition, cold plates, CDUs, quick connectors, secondary-loop coolants, monitoring software, and modular liquid cooling infrastructure will create broader supply chain opportunities, while vendors with strong server integration, engineering delivery, and reliability validation capabilities are likely to gain higher market share.

The Data Center Direct-to-Chip Cooling market is expanding rapidly as the power density of AI servers, high-performance GPUs, CPUs, and accelerator cards continues to increase. Traditional air cooling is increasingly constrained by thermal efficiency, energy consumption, and rack power density limitations in high-heat-flux environments. Direct-to-chip liquid cooling uses cold plates, microchannel cold plates, CDUs, liquid cooling piping, and coolant circulation systems to remove heat directly from chip-level heat sources, significantly improving cooling efficiency and reducing fan power consumption. The market is mainly driven by AI data centers, cloud computing, high-performance computing, hyperscale data centers, and edge computing applications. As liquid-cooled servers become more standardized, energy-efficiency requirements tighten, and rack power densities move toward 50kW, 100kW, or even higher levels, direct-to-chip cooling is expected to become a key growth segment in the data center thermal management market.

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

Center Direct to Chip Cooling industry.

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Data Center Direct to Chip 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 Data Center Direct to Chip Cooling.

This report presents a comprehensive overview, market shares, and growth opportunities of Data Center Direct to Chip Cooling market by product type, application, key players and key regions and countries.

Segmentation by Type:

Water-based Coolant Direct Cooling

Non-water-based Coolant Direct Cooling

Segmentation by System Architecture:

Server-grade Direct Cooling System

Rack-level Direct Cooling System

Other

Segmentation by Cold Plate Heat Exchange Method:

Single-phase Cold Plate Direct Cooling

Two-phase Cold Plate Direct Cooling

Segmentation by Application:

Cloud Data Centers

AI Data Centers / AI Servers

High-Performance Computing (HPC)

Enterprise Data Centers

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

nVent

Lenovo

Supermicro

Schneider Electric

Flex Ltd.

CoolIT System

Modine

DCX Liquid Cooling Systems

Inspur

Malico

ZutaCore

Chilldyne

Accelsius

Delta Power Solutions

Stulz

Iceotope Precision Liquid Cooling

Iceotope

BOYD

Wiwynn Corporation

Kaori

Rittal GmbH & Co. KG

LiquidStack

Taisol Electronics

Quanta

Shenzhen Green Cloud Map Technology

Goaland Energy Conservation Tech

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