

Global Data Center Liquid Cooling Piping Components Market Growth (Status and Outlook) 2026-2032

<https://marketpublishers.com/r/G04A541AA59DEN.html>

Date: October 2026

Pages: 125

Price: US\$ 3,660.00 (Single User License)

ID: G04A541AA59DEN

Abstracts

The global Data Center Liquid Cooling Piping Components market size is predicted to grow from US\$ 2727 million in 2025 to US\$ 7014 million in 2032; it is expected to grow at a CAGR of 14.5% from 2026 to 2032.

Data Center Liquid Cooling Piping Components refer to critical fluid management components used in liquid cooling systems for modern data centers, enabling coolant circulation, distribution, connection, and flow control between servers, racks, cooling distribution units (CDUs), heat exchangers, and external cooling infrastructure. The product scope covers liquid cooling hoses, rigid piping, quick connectors, manifolds, valves, couplings, and sealing components designed for high-density computing environments. These components support efficient heat transfer from high-performance processors and AI accelerators by providing reliable liquid flow channels with requirements for high pressure resistance, low leakage, thermal stability, corrosion resistance, and long-term operational reliability. The market mainly serves AI data centers, cloud computing facilities, hyperscale data centers, enterprise computing infrastructure, and edge computing environments adopting cold plate, rack-level, and immersion liquid cooling architectures.

Key Findings

Data center liquid cooling piping components are mainly driven by AI server and high-density computing infrastructure deployment

Quick connectors and liquid cooling manifolds represent core components in advanced liquid cooling systems

Cold plate liquid cooling remains the dominant architecture for commercial AI data center deployment

North America leads high-performance computing liquid cooling adoption with strong hyperscale data center demand

Leading suppliers compete through fluid reliability, customization capability, and thermal management expertise

Market Trends

The data center liquid cooling piping components market is evolving rapidly as increasing AI workloads, GPU clusters, and high-performance computing systems push rack power density beyond the limitations of traditional air cooling. Future product development is focused on higher flow rates, improved pressure tolerance, enhanced sealing technologies, reduced installation complexity, and standardized modular designs. Quick disconnect technologies, advanced manifolds, and integrated rack-level liquid distribution solutions are becoming increasingly important as operators seek scalable cooling architectures for AI infrastructure. Manufacturers are also improving material compatibility, contamination control, and lifecycle reliability to meet the requirements of next-generation data centers.

Market Dynamics

Drivers

The primary growth drivers include rapid expansion of AI computing infrastructure, increasing deployment of GPU-based servers, rising rack power density, and global demand for energy-efficient data centers. Liquid cooling enables significantly improved thermal management compared with conventional air cooling and is increasingly adopted by cloud service providers, internet companies, and enterprise operators. The transition toward direct-to-chip cooling and rack-level liquid cooling architectures is creating sustained demand for specialized piping components, quick connectors, and coolant distribution solutions.

Restraints

Market development is constrained by the complexity of liquid cooling system

integration, higher initial infrastructure investment, strict requirements for leakage prevention, and the need for specialized installation and maintenance capabilities. Data center operators must also address coolant compatibility, reliability verification, and long-term operational risks before large-scale deployment, which may slow adoption in traditional facilities.

Opportunities

Major opportunities arise from the rapid growth of AI data centers, expansion of hyperscale computing facilities, and increasing adoption of liquid cooling in enterprise and edge computing environments. Suppliers with capabilities in precision fluid control, customized manifold design, high-performance connectors, and integrated cooling solutions are positioned to benefit from future market expansion. Standardization of liquid cooling interfaces and growing demand for modular rack solutions will further create opportunities for component manufacturers.

Challenges

The industry faces challenges related to technology standardization, supply chain coordination, reliability certification, and competition between different liquid cooling architectures. Component suppliers need to maintain extremely low leakage rates, high durability, and compatibility with evolving server designs. Rapid changes in AI hardware platforms also require continuous product adaptation and engineering investment.

Industry Chain Analysis

The data center liquid cooling piping components industry chain consists of upstream materials, midstream component manufacturing, and downstream data center applications. The upstream sector includes stainless steel, copper alloys, polymers, sealing materials, precision machining equipment, and surface treatment technologies that determine corrosion resistance, mechanical strength, and reliability. The midstream sector includes manufacturers producing liquid cooling hoses, quick connectors, manifolds, valves, and integrated fluid distribution components. The downstream sector covers hyperscale data centers, cloud service providers, telecommunications operators, government computing facilities, healthcare computing infrastructure, and AI computing centers. Value creation mainly comes from precision manufacturing capability, fluid reliability engineering, customization services, and integration with advanced liquid cooling architectures.

Segment Insights

By product type, quick connectors, liquid cooling manifolds, and hoses represent the most important segments because they directly influence coolant circulation efficiency, maintenance convenience, and system reliability. Quick connectors are increasingly valued in rack-level and direct liquid cooling systems due to their ability to simplify server replacement and reduce maintenance downtime. Liquid cooling manifolds are becoming strategically important as AI racks require more complex coolant distribution structures. By cooling structure, cold plate liquid cooling currently represents the largest commercial segment, while rack-level liquid cooling and immersion liquid cooling are gaining attention for future high-density AI computing applications. The market structure is shifting toward higher-value customized components rather than standardized low-cost piping products.

Downstream Market Opportunities

The major downstream opportunities are concentrated in AI data centers, cloud computing infrastructure, telecommunications facilities, enterprise data centers, and specialized computing environments. AI training and inference workloads require increasingly powerful accelerators, creating demand for advanced liquid cooling solutions capable of supporting higher thermal loads. Cloud providers and large-scale data center operators are accelerating adoption of liquid cooling technologies to improve energy efficiency, reduce operating costs, and support next-generation computing platforms. Emerging applications in edge computing and industry-specific data centers will provide additional growth opportunities.

Regional Insights

North America represents one of the most advanced markets for data center liquid cooling piping components due to strong demand from hyperscale cloud providers, AI infrastructure developers, and high-performance computing operators. The region has established liquid cooling ecosystems covering component suppliers, system integrators, and data center operators. Asia Pacific is becoming a major growth region driven by AI infrastructure investment, semiconductor ecosystem expansion, and increasing construction of large-scale data centers. China, Japan, South Korea, and Taiwan are strengthening their positions through local manufacturing capabilities in precision connectors, thermal management components, and cooling systems. Europe is also expanding adoption as data center operators focus on energy efficiency and sustainability requirements.

Competitive Landscape Analysis

The competitive landscape is characterized by a combination of global fluid control specialists, thermal management companies, and regional precision component manufacturers. International companies such as Nitto Kohki, Stübli, Danfoss, Parker Hannifin, Gates, Swagelok, and Boyd Corporation compete through advanced fluid connection technologies, reliability certification, and global customer networks. Data center infrastructure companies such as Vertiv and nVent participate through integrated cooling system solutions. Asian suppliers including Auras, Envicool, Tongfei, Jonhon Optronic Technology, Goaland, FRD, and other precision component manufacturers are strengthening competitiveness through localized production, customized solutions, and close cooperation with AI server ecosystem companies. Future competition will focus on connector standardization, liquid distribution efficiency, manufacturing precision, and integrated thermal management capability.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Data Center 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 Data Center 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 Data Center Liquid Cooling Piping Components market.

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

This report presents a comprehensive overview, market shares, and growth opportunities of Data Center 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:

Internet

Telecommunications

Government

Healthcare

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 analyzing the company's coverage, product portfolio, its market penetration.

Nitto Kohki

St?ubli

Vertiv

nVent

Danfoss

Parker Hannifin

Gates

Boyd Corporation

Colder Products Company

Swagelok

Auras

Jonhon Optronic Technology Co., Ltd.

Tongfei Co., Ltd.

Remindore Technology

Envicool Technology Co., Ltd.

Yimikang Tech. Group Co., Ltd.

Zhongding Group

Guangzhou Goaland Energy Conservation Tech. Co., Ltd

Shenzhen FRD Science & Technology Co., Ltd.

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Data Center Liquid Cooling Piping Components Market Size (2021-2032)
- 2.1.2 Data Center Liquid Cooling Piping Components Market Size CAGR by Region (2021 VS 2025 VS 2032)
- 2.1.3 World Current & Future Analysis for Data Center Liquid Cooling Piping Components by Country/Region (2021, 2025 & 2032)

2.2 Data Center Liquid Cooling Piping Components Segment by Type

- 2.2.1 Liquid Cooling Hose
- 2.2.2 Quick Connectors
- 2.2.3 Liquid Cooling Manifolds
- 2.2.4 Others
- 2.2.5 Data Center Liquid Cooling Piping Components Market Size by Type
 - 2.2.5.1 Data Center Liquid Cooling Piping Components Market Size CAGR by Type (2021 VS 2025 VS 2032)
 - 2.2.5.2 Global Data Center Liquid Cooling Piping Components Market Size Market Share by Type (2021-2026)

2.3 Data Center Liquid Cooling Piping Components Segment by Liquid Cooling Structures

- 2.3.1 Cold Plate Liquid Cooling
- 2.3.2 Immersion Liquid Cooling
- 2.3.3 Rack-Level Liquid Cooling
- 2.3.4 Data Center Liquid Cooling Piping Components Market Size by Liquid Cooling Structures
 - 2.3.4.1 Data Center Liquid Cooling Piping Components Market Size CAGR by Liquid

Cooling Structures (2021 VS 2025 VS 2032)

2.3.4.2 Global Data Center Liquid Cooling Piping Components Market Size Market Share by Liquid Cooling Structures (2021-2026)

2.4 Data Center Liquid Cooling Piping Components Segment by Application

2.4.1 Internet

2.4.2 Telecommunications

2.4.3 Government

2.4.4 Healthcare

2.4.5 Other

2.4.6 Data Center Liquid Cooling Piping Components Market Size by Application

2.4.6.1 Data Center Liquid Cooling Piping Components Market Size CAGR by Application (2021 VS 2025 VS 2032)

2.4.6.2 Global Data Center Liquid Cooling Piping Components Market Size Market Share by Application (2021-2026)

3 DATA CENTER LIQUID COOLING PIPING COMPONENTS MARKET SIZE BY PLAYER

3.1 Data Center Liquid Cooling Piping Components Market Size Market Share by Player

3.1.1 Global Data Center Liquid Cooling Piping Components Revenue by Player (2021-2026)

3.1.2 Global Data Center Liquid Cooling Piping Components Revenue Market Share by Player (2021-2026)

3.2 Global Data Center Liquid Cooling Piping Components Key Players Head office and Products Offered

3.3 Market Concentration Rate Analysis

3.3.1 Competition Landscape Analysis

3.3.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.4 New Products and Potential Entrants

3.5 Mergers & Acquisitions, Expansion

4 DATA CENTER LIQUID COOLING PIPING COMPONENTS BY REGION

4.1 Data Center Liquid Cooling Piping Components Market Size by Region (2021-2026)

4.2 Global Data Center Liquid Cooling Piping Components Annual Revenue by Country/Region (2021-2026)

4.3 Americas Data Center Liquid Cooling Piping Components Market Size Growth (2021-2026)

4.4 APAC Data Center Liquid Cooling Piping Components Market Size Growth

(2021-2026)

4.5 Europe Data Center Liquid Cooling Piping Components Market Size Growth

(2021-2026)

4.6 Middle East & Africa Data Center Liquid Cooling Piping Components Market Size Growth (2021-2026)

5 AMERICAS

5.1 Americas Data Center Liquid Cooling Piping Components Market Size by Country (2021-2026)

5.2 Americas Data Center Liquid Cooling Piping Components Market Size by Type (2021-2026)

5.3 Americas Data Center Liquid Cooling Piping Components Market Size by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Data Center Liquid Cooling Piping Components Market Size by Region (2021-2026)

6.2 APAC Data Center Liquid Cooling Piping Components Market Size by Type (2021-2026)

6.3 APAC Data Center Liquid Cooling Piping Components Market Size by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

7 EUROPE

7.1 Europe Data Center Liquid Cooling Piping Components Market Size by Country (2021-2026)

7.2 Europe Data Center Liquid Cooling Piping Components Market Size by Type

(2021-2026)

7.3 Europe Data Center Liquid Cooling Piping Components Market Size by Application

(2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Data Center Liquid Cooling Piping Components by Region
(2021-2026)

8.2 Middle East & Africa Data Center Liquid Cooling Piping Components Market Size by
Type (2021-2026)

8.3 Middle East & Africa Data Center Liquid Cooling Piping Components Market Size by
Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 GLOBAL DATA CENTER LIQUID COOLING PIPING COMPONENTS MARKET FORECAST

10.1 Global Data Center Liquid Cooling Piping Components Forecast by Region
(2027-2032)

10.1.1 Global Data Center Liquid Cooling Piping Components Forecast by Region
(2027-2032)

10.1.2 Americas Data Center Liquid Cooling Piping Components Forecast

10.1.3 APAC Data Center Liquid Cooling Piping Components Forecast

10.1.4 Europe Data Center Liquid Cooling Piping Components Forecast

10.1.5 Middle East & Africa Data Center Liquid Cooling Piping Components Forecast
10.2 Americas Data Center Liquid Cooling Piping Components Forecast by Country
(2027-2032)

10.2.1 United States Market Data Center Liquid Cooling Piping Components Forecast
10.2.2 Canada Market Data Center Liquid Cooling Piping Components Forecast
10.2.3 Mexico Market Data Center Liquid Cooling Piping Components Forecast
10.2.4 Brazil Market Data Center Liquid Cooling Piping Components Forecast
10.3 APAC Data Center Liquid Cooling Piping Components Forecast by Region
(2027-2032)

10.3.1 China Data Center Liquid Cooling Piping Components Market Forecast
10.3.2 Japan Market Data Center Liquid Cooling Piping Components Forecast
10.3.3 Korea Market Data Center Liquid Cooling Piping Components Forecast
10.3.4 Southeast Asia Market Data Center Liquid Cooling Piping Components
Forecast

10.3.5 India Market Data Center Liquid Cooling Piping Components Forecast
10.3.6 Australia Market Data Center Liquid Cooling Piping Components Forecast
10.4 Europe Data Center Liquid Cooling Piping Components Forecast by Country
(2027-2032)

10.4.1 Germany Market Data Center Liquid Cooling Piping Components Forecast
10.4.2 France Market Data Center Liquid Cooling Piping Components Forecast
10.4.3 UK Market Data Center Liquid Cooling Piping Components Forecast
10.4.4 Italy Market Data Center Liquid Cooling Piping Components Forecast
10.4.5 Russia Market Data Center Liquid Cooling Piping Components Forecast
10.5 Middle East & Africa Data Center Liquid Cooling Piping Components Forecast by
Region (2027-2032)

10.5.1 Egypt Market Data Center Liquid Cooling Piping Components Forecast
10.5.2 South Africa Market Data Center Liquid Cooling Piping Components Forecast
10.5.3 Israel Market Data Center Liquid Cooling Piping Components Forecast
10.5.4 Turkey Market Data Center Liquid Cooling Piping Components Forecast
10.6 Global Data Center Liquid Cooling Piping Components Forecast by Type
(2027-2032)

10.7 Global Data Center Liquid Cooling Piping Components Forecast by Application
(2027-2032)

10.7.1 GCC Countries Market Data Center Liquid Cooling Piping Components
Forecast

11 KEY PLAYERS ANALYSIS

11.1 Nitto Kohki

- 11.1.1 Nitto Kohki Company Information
- 11.1.2 Nitto Kohki Data Center Liquid Cooling Piping Components Product Offered
- 11.1.3 Nitto Kohki Data Center Liquid Cooling Piping Components Revenue, Gross Margin and Market Share (2021-2026)
- 11.1.4 Nitto Kohki Main Business Overview
- 11.1.5 Nitto Kohki Latest Developments
- 11.2 St?ubli
 - 11.2.1 St?ubli Company Information
 - 11.2.2 St?ubli Data Center Liquid Cooling Piping Components Product Offered
 - 11.2.3 St?ubli Data Center Liquid Cooling Piping Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.2.4 St?ubli Main Business Overview
 - 11.2.5 St?ubli Latest Developments
- 11.3 Vertiv
 - 11.3.1 Vertiv Company Information
 - 11.3.2 Vertiv Data Center Liquid Cooling Piping Components Product Offered
 - 11.3.3 Vertiv Data Center Liquid Cooling Piping Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.3.4 Vertiv Main Business Overview
 - 11.3.5 Vertiv Latest Developments
- 11.4 nVent
 - 11.4.1 nVent Company Information
 - 11.4.2 nVent Data Center Liquid Cooling Piping Components Product Offered
 - 11.4.3 nVent Data Center Liquid Cooling Piping Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.4.4 nVent Main Business Overview
 - 11.4.5 nVent Latest Developments
- 11.5 Danfoss
 - 11.5.1 Danfoss Company Information
 - 11.5.2 Danfoss Data Center Liquid Cooling Piping Components Product Offered
 - 11.5.3 Danfoss Data Center Liquid Cooling Piping Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.5.4 Danfoss Main Business Overview
 - 11.5.5 Danfoss Latest Developments
- 11.6 Parker Hannifin
 - 11.6.1 Parker Hannifin Company Information
 - 11.6.2 Parker Hannifin Data Center Liquid Cooling Piping Components Product Offered
 - 11.6.3 Parker Hannifin Data Center Liquid Cooling Piping Components Revenue,

Gross Margin and Market Share (2021-2026)

11.6.4 Parker Hannifin Main Business Overview

11.6.5 Parker Hannifin Latest Developments

11.7 Gates

11.7.1 Gates Company Information

11.7.2 Gates Data Center Liquid Cooling Piping Components Product Offered

11.7.3 Gates Data Center Liquid Cooling Piping Components Revenue, Gross Margin and Market Share (2021-2026)

11.7.4 Gates Main Business Overview

11.7.5 Gates Latest Developments

11.8 Boyd Corporation

11.8.1 Boyd Corporation Company Information

11.8.2 Boyd Corporation Data Center Liquid Cooling Piping Components Product Offered

11.8.3 Boyd Corporation Data Center Liquid Cooling Piping Components Revenue, Gross Margin and Market Share (2021-2026)

11.8.4 Boyd Corporation Main Business Overview

11.8.5 Boyd Corporation Latest Developments

11.9 Colder Products Company

11.9.1 Colder Products Company Company Information

11.9.2 Colder Products Company Data Center Liquid Cooling Piping Components Product Offered

11.9.3 Colder Products Company Data Center Liquid Cooling Piping Components Revenue, Gross Margin and Market Share (2021-2026)

11.9.4 Colder Products Company Main Business Overview

11.9.5 Colder Products Company Latest Developments

11.10 Swagelok

11.10.1 Swagelok Company Information

11.10.2 Swagelok Data Center Liquid Cooling Piping Components Product Offered

11.10.3 Swagelok Data Center Liquid Cooling Piping Components Revenue, Gross Margin and Market Share (2021-2026)

11.10.4 Swagelok Main Business Overview

11.10.5 Swagelok Latest Developments

11.11 Auras

11.11.1 Auras Company Information

11.11.2 Auras Data Center Liquid Cooling Piping Components Product Offered

11.11.3 Auras Data Center Liquid Cooling Piping Components Revenue, Gross Margin and Market Share (2021-2026)

11.11.4 Auras Main Business Overview

- 11.11.5 Auras Latest Developments
- 11.12 Jonhon Optronic Technology Co., Ltd.
 - 11.12.1 Jonhon Optronic Technology Co., Ltd. Company Information
 - 11.12.2 Jonhon Optronic Technology Co., Ltd. Data Center Liquid Cooling Piping Components Product Offered
 - 11.12.3 Jonhon Optronic Technology Co., Ltd. Data Center Liquid Cooling Piping Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.12.4 Jonhon Optronic Technology Co., Ltd. Main Business Overview
 - 11.12.5 Jonhon Optronic Technology Co., Ltd. Latest Developments
- 11.13 Tongfei Co., Ltd.
 - 11.13.1 Tongfei Co., Ltd. Company Information
 - 11.13.2 Tongfei Co., Ltd. Data Center Liquid Cooling Piping Components Product Offered
 - 11.13.3 Tongfei Co., Ltd. Data Center Liquid Cooling Piping Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.13.4 Tongfei Co., Ltd. Main Business Overview
 - 11.13.5 Tongfei Co., Ltd. Latest Developments
- 11.14 Remindore Technology
 - 11.14.1 Remindore Technology Company Information
 - 11.14.2 Remindore Technology Data Center Liquid Cooling Piping Components Product Offered
 - 11.14.3 Remindore Technology Data Center Liquid Cooling Piping Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.14.4 Remindore Technology Main Business Overview
 - 11.14.5 Remindore Technology Latest Developments
- 11.15 Envicool Technology Co., Ltd.
 - 11.15.1 Envicool Technology Co., Ltd. Company Information
 - 11.15.2 Envicool Technology Co., Ltd. Data Center Liquid Cooling Piping Components Product Offered
 - 11.15.3 Envicool Technology Co., Ltd. Data Center Liquid Cooling Piping Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.15.4 Envicool Technology Co., Ltd. Main Business Overview
 - 11.15.5 Envicool Technology Co., Ltd. Latest Developments
- 11.16 Yimikang Tech. Group Co., Ltd.
 - 11.16.1 Yimikang Tech. Group Co., Ltd. Company Information
 - 11.16.2 Yimikang Tech. Group Co., Ltd. Data Center Liquid Cooling Piping Components Product Offered
 - 11.16.3 Yimikang Tech. Group Co., Ltd. Data Center Liquid Cooling Piping Components Revenue, Gross Margin and Market Share (2021-2026)

- 11.16.4 Yimikang Tech. Group Co., Ltd. Main Business Overview
- 11.16.5 Yimikang Tech. Group Co., Ltd. Latest Developments
- 11.17 Zhongding Group
 - 11.17.1 Zhongding Group Company Information
 - 11.17.2 Zhongding Group Data Center Liquid Cooling Piping Components Product Offered
 - 11.17.3 Zhongding Group Data Center Liquid Cooling Piping Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.17.4 Zhongding Group Main Business Overview
 - 11.17.5 Zhongding Group Latest Developments
- 11.18 Guangzhou Goaland Energy Conservation Tech. Co., Ltd
 - 11.18.1 Guangzhou Goaland Energy Conservation Tech. Co., Ltd Company Information
 - 11.18.2 Guangzhou Goaland Energy Conservation Tech. Co., Ltd Data Center Liquid Cooling Piping Components Product Offered
 - 11.18.3 Guangzhou Goaland Energy Conservation Tech. Co., Ltd Data Center Liquid Cooling Piping Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.18.4 Guangzhou Goaland Energy Conservation Tech. Co., Ltd Main Business Overview
 - 11.18.5 Guangzhou Goaland Energy Conservation Tech. Co., Ltd Latest Developments
- 11.19 Shenzhen FRD Science & Technology Co., Ltd.
 - 11.19.1 Shenzhen FRD Science & Technology Co., Ltd. Company Information
 - 11.19.2 Shenzhen FRD Science & Technology Co., Ltd. Data Center Liquid Cooling Piping Components Product Offered
 - 11.19.3 Shenzhen FRD Science & Technology Co., Ltd. Data Center Liquid Cooling Piping Components Revenue, Gross Margin and Market Share (2021-2026)
 - 11.19.4 Shenzhen FRD Science & Technology Co., Ltd. Main Business Overview
 - 11.19.5 Shenzhen FRD Science & Technology Co., Ltd. Latest Developments

12 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Data Center Liquid Cooling Piping Components Market Size CAGR by Region (2021 VS 2025 VS 2032) & (\$ millions)

Table 2. Data Center Liquid Cooling Piping Components Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Liquid Cooling Hose

Table 4. Major Players of Quick Connectors

Table 5. Major Players of Liquid Cooling Manifolds

Table 6. Major Players of Others

Table 7. Data Center Liquid Cooling Piping Components Market Size CAGR by Type (2021 VS 2025 VS 2032) & (\$ millions)

Table 8. Global Data Center Liquid Cooling Piping Components Market Size by Type (2021-2026) & (\$ millions)

Table 9. Global Data Center Liquid Cooling Piping Components Market Size Market Share by Type (2021-2026)

Table 10. Major Players of Cold Plate Liquid Cooling

Table 11. Major Players of Immersion Liquid Cooling

Table 12. Major Players of Rack-Level Liquid Cooling

Table 13. Data Center Liquid Cooling Piping Components Market Size CAGR by Liquid Cooling Structures (2021 VS 2025 VS 2032) & (\$ millions)

Table 14. Global Data Center Liquid Cooling Piping Components Market Size by Liquid Cooling Structures (2021-2026) & (\$ millions)

Table 15. Global Data Center Liquid Cooling Piping Components Market Size Market Share by Liquid Cooling Structures (2021-2026)

Table 16. Data Center Liquid Cooling Piping Components Market Size CAGR by Application (2021 VS 2025 VS 2032) & (\$ millions)

Table 17. Global Data Center Liquid Cooling Piping Components Market Size by Application (2021-2026) & (\$ millions)

Table 18. Global Data Center Liquid Cooling Piping Components Market Size Market Share by Application (2021-2026)

Table 19. Global Data Center Liquid Cooling Piping Components Revenue by Player (2021-2026) & (\$ millions)

Table 20. Global Data Center Liquid Cooling Piping Components Revenue Market Share by Player (2021-2026)

Table 21. Data Center Liquid Cooling Piping Components Key Players Head office and Products Offered

Table 22. Data Center Liquid Cooling Piping Components Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 23. New Products and Potential Entrants

Table 24. Mergers & Acquisitions, Expansion

Table 25. Global Data Center Liquid Cooling Piping Components Market Size by Region (2021-2026) & (\$ millions)

Table 26. Global Data Center Liquid Cooling Piping Components Market Size Market Share by Region (2021-2026)

Table 27. Global Data Center Liquid Cooling Piping Components Revenue by Country/Region (2021-2026) & (\$ millions)

Table 28. Global Data Center Liquid Cooling Piping Components Revenue Market Share by Country/Region (2021-2026)

Table 29. Americas Data Center Liquid Cooling Piping Components Market Size by Country (2021-2026) & (\$ millions)

Table 30. Americas Data Center Liquid Cooling Piping Components Market Size Market Share by Country (2021-2026)

Table 31. Americas Data Center Liquid Cooling Piping Components Market Size by Type (2021-2026) & (\$ millions)

Table 32. Americas Data Center Liquid Cooling Piping Components Market Size Market Share by Type (2021-2026)

Table 33. Americas Data Center Liquid Cooling Piping Components Market Size by Application (2021-2026) & (\$ millions)

Table 34. Americas Data Center Liquid Cooling Piping Components Market Size Market Share by Application (2021-2026)

Table 35. APAC Data Center Liquid Cooling Piping Components Market Size by Region (2021-2026) & (\$ millions)

Table 36. APAC Data Center Liquid Cooling Piping Components Market Size Market Share by Region (2021-2026)

Table 37. APAC Data Center Liquid Cooling Piping Components Market Size by Type (2021-2026) & (\$ millions)

Table 38. APAC Data Center Liquid Cooling Piping Components Market Size by Application (2021-2026) & (\$ millions)

Table 39. Europe Data Center Liquid Cooling Piping Components Market Size by Country (2021-2026) & (\$ millions)

Table 40. Europe Data Center Liquid Cooling Piping Components Market Size Market Share by Country (2021-2026)

Table 41. Europe Data Center Liquid Cooling Piping Components Market Size by Type (2021-2026) & (\$ millions)

Table 42. Europe Data Center Liquid Cooling Piping Components Market Size by

Application (2021-2026) & (\$ millions)

Table 43. Middle East & Africa Data Center Liquid Cooling Piping Components Market Size by Region (2021-2026) & (\$ millions)

Table 44. Middle East & Africa Data Center Liquid Cooling Piping Components Market Size by Type (2021-2026) & (\$ millions)

Table 45. Middle East & Africa Data Center Liquid Cooling Piping Components Market Size by Application (2021-2026) & (\$ millions)

Table 46. Key Market Drivers & Growth Opportunities of Data Center Liquid Cooling Piping Components

Table 47. Key Market Challenges & Risks of Data Center Liquid Cooling Piping Components

Table 48. Key Industry Trends of Data Center Liquid Cooling Piping Components

Table 49. Global Data Center Liquid Cooling Piping Components Market Size Forecast by Region (2027-2032) & (\$ millions)

Table 50. Global Data Center Liquid Cooling Piping Components Market Size Market Share Forecast by Region (2027-2032)

Table 51. Global Data Center Liquid Cooling Piping Components Market Size Forecast by Type (2027-2032) & (\$ millions)

Table 52. Global Data Center Liquid Cooling Piping Components Market Size Forecast by Application (2027-2032) & (\$ millions)

Table 53. Nitto Kohki Details, Company Type, Data Center Liquid Cooling Piping Components Area Served and Its Competitors

Table 54. Nitto Kohki Data Center Liquid Cooling Piping Components Product Offered

Table 55. Nitto Kohki Data Center Liquid Cooling Piping Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 56. Nitto Kohki Main Business

Table 57. Nitto Kohki Latest Developments

Table 58. St?ubli Details, Company Type, Data Center Liquid Cooling Piping Components Area Served and Its Competitors

Table 59. St?ubli Data Center Liquid Cooling Piping Components Product Offered

Table 60. St?ubli Data Center Liquid Cooling Piping Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 61. St?ubli Main Business

Table 62. St?ubli Latest Developments

Table 63. Vertiv Details, Company Type, Data Center Liquid Cooling Piping Components Area Served and Its Competitors

Table 64. Vertiv Data Center Liquid Cooling Piping Components Product Offered

Table 65. Vertiv Data Center Liquid Cooling Piping Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 66. Vertiv Main Business
Table 67. Vertiv Latest Developments
Table 68. nVent Details, Company Type, Data Center Liquid Cooling Piping Components Area Served and Its Competitors
Table 69. nVent Data Center Liquid Cooling Piping Components Product Offered
Table 70. nVent Data Center Liquid Cooling Piping Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 71. nVent Main Business
Table 72. nVent Latest Developments
Table 73. Danfoss Details, Company Type, Data Center Liquid Cooling Piping Components Area Served and Its Competitors
Table 74. Danfoss Data Center Liquid Cooling Piping Components Product Offered
Table 75. Danfoss Data Center Liquid Cooling Piping Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 76. Danfoss Main Business
Table 77. Danfoss Latest Developments
Table 78. Parker Hannifin Details, Company Type, Data Center Liquid Cooling Piping Components Area Served and Its Competitors
Table 79. Parker Hannifin Data Center Liquid Cooling Piping Components Product Offered
Table 80. Parker Hannifin Data Center Liquid Cooling Piping Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 81. Parker Hannifin Main Business
Table 82. Parker Hannifin Latest Developments
Table 83. Gates Details, Company Type, Data Center Liquid Cooling Piping Components Area Served and Its Competitors
Table 84. Gates Data Center Liquid Cooling Piping Components Product Offered
Table 85. Gates Data Center Liquid Cooling Piping Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 86. Gates Main Business
Table 87. Gates Latest Developments
Table 88. Boyd Corporation Details, Company Type, Data Center Liquid Cooling Piping Components Area Served and Its Competitors
Table 89. Boyd Corporation Data Center Liquid Cooling Piping Components Product Offered
Table 90. Boyd Corporation Data Center Liquid Cooling Piping Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 91. Boyd Corporation Main Business
Table 92. Boyd Corporation Latest Developments

Table 93. Colder Products Company Details, Company Type, Data Center Liquid Cooling Piping Components Area Served and Its Competitors

Table 94. Colder Products Company Data Center Liquid Cooling Piping Components Product Offered

Table 95. Colder Products Company Data Center Liquid Cooling Piping Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 96. Colder Products Company Main Business

Table 97. Colder Products Company Latest Developments

Table 98. Swagelok Details, Company Type, Data Center Liquid Cooling Piping Components Area Served and Its Competitors

Table 99. Swagelok Data Center Liquid Cooling Piping Components Product Offered

Table 100. Swagelok Data Center Liquid Cooling Piping Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 101. Swagelok Main Business

Table 102. Swagelok Latest Developments

Table 103. Auras Details, Company Type, Data Center Liquid Cooling Piping Components Area Served and Its Competitors

Table 104. Auras Data Center Liquid Cooling Piping Components Product Offered

Table 105. Auras Data Center Liquid Cooling Piping Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 106. Auras Main Business

Table 107. Auras Latest Developments

Table 108. Jonhon Optronic Technology Co., Ltd. Details, Company Type, Data Center Liquid Cooling Piping Components Area Served and Its Competitors

Table 109. Jonhon Optronic Technology Co., Ltd. Data Center Liquid Cooling Piping Components Product Offered

Table 110. Jonhon Optronic Technology Co., Ltd. Data Center Liquid Cooling Piping Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 111. Jonhon Optronic Technology Co., Ltd. Main Business

Table 112. Jonhon Optronic Technology Co., Ltd. Latest Developments

Table 113. Tongfei Co., Ltd. Details, Company Type, Data Center Liquid Cooling Piping Components Area Served and Its Competitors

Table 114. Tongfei Co., Ltd. Data Center Liquid Cooling Piping Components Product Offered

Table 115. Tongfei Co., Ltd. Data Center Liquid Cooling Piping Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 116. Tongfei Co., Ltd. Main Business

Table 117. Tongfei Co., Ltd. Latest Developments

Table 118. Remindore Technology Details, Company Type, Data Center Liquid Cooling

Piping Components Area Served and Its Competitors

Table 119. Remindore Technology Data Center Liquid Cooling Piping Components Product Offered

Table 120. Remindore Technology Data Center Liquid Cooling Piping Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 121. Remindore Technology Main Business

Table 122. Remindore Technology Latest Developments

Table 123. Envicool Technology Co., Ltd. Details, Company Type, Data Center Liquid Cooling Piping Components Area Served and Its Competitors

Table 124. Envicool Technology Co., Ltd. Data Center Liquid Cooling Piping Components Product Offered

Table 125. Envicool Technology Co., Ltd. Data Center Liquid Cooling Piping Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 126. Envicool Technology Co., Ltd. Main Business

Table 127. Envicool Technology Co., Ltd. Latest Developments

Table 128. Yimikang Tech. Group Co., Ltd. Details, Company Type, Data Center Liquid Cooling Piping Components Area Served and Its Competitors

Table 129. Yimikang Tech. Group Co., Ltd. Data Center Liquid Cooling Piping Components Product Offered

Table 130. Yimikang Tech. Group Co., Ltd. Data Center Liquid Cooling Piping Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 131. Yimikang Tech. Group Co., Ltd. Main Business

Table 132. Yimikang Tech. Group Co., Ltd. Latest Developments

Table 133. Zhongding Group Details, Company Type, Data Center Liquid Cooling Piping Components Area Served and Its Competitors

Table 134. Zhongding Group Data Center Liquid Cooling Piping Components Product Offered

Table 135. Zhongding Group Data Center Liquid Cooling Piping Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 136. Zhongding Group Main Business

Table 137. Zhongding Group Latest Developments

Table 138. Guangzhou Goaland Energy Conservation Tech. Co., Ltd Details, Company Type, Data Center Liquid Cooling Piping Components Area Served and Its Competitors

Table 139. Guangzhou Goaland Energy Conservation Tech. Co., Ltd Data Center Liquid Cooling Piping Components Product Offered

Table 140. Guangzhou Goaland Energy Conservation Tech. Co., Ltd Data Center Liquid Cooling Piping Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 141. Guangzhou Goaland Energy Conservation Tech. Co., Ltd Main Business

Table 142. Guangzhou Goaland Energy Conservation Tech. Co., Ltd Latest Developments

Table 143. Shenzhen FRD Science & Technology Co., Ltd. Details, Company Type, Data Center Liquid Cooling Piping Components Area Served and Its Competitors

Table 144. Shenzhen FRD Science & Technology Co., Ltd. Data Center Liquid Cooling Piping Components Product Offered

Table 145. Shenzhen FRD Science & Technology Co., Ltd. Data Center Liquid Cooling Piping Components Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 146. Shenzhen FRD Science & Technology Co., Ltd. Main Business

Table 147. Shenzhen FRD Science & Technology Co., Ltd. Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Data Center Liquid Cooling Piping Components Report Years Considered

Figure 2. Research Objectives

Figure 3. Research Methodology

Figure 4. Research Process and Data Source

Figure 5. Global Data Center Liquid Cooling Piping Components Market Size Growth Rate (2021-2032) (\$ millions)

Figure 6. Data Center Liquid Cooling Piping Components Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 7. Data Center Liquid Cooling Piping Components Sales Market Share by Country/Region (2025)

Figure 8. Data Center Liquid Cooling Piping Components Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 9. Global Data Center Liquid Cooling Piping Components Market Size Market Share by Type in 2025

Figure 10. Global Data Center Liquid Cooling Piping Components Market Size Market Share by Liquid Cooling Structures in 2025

Figure 11. Data Center Liquid Cooling Piping Components in Internet

Figure 12. Global Data Center Liquid Cooling Piping Components Market: Internet (2021-2026) & (\$ millions)

Figure 13. Data Center Liquid Cooling Piping Components in Telecommunications

Figure 14. Global Data Center Liquid Cooling Piping Components Market: Telecommunications (2021-2026) & (\$ millions)

Figure 15. Data Center Liquid Cooling Piping Components in Government

Figure 16. Global Data Center Liquid Cooling Piping Components Market: Government (2021-2026) & (\$ millions)

Figure 17. Data Center Liquid Cooling Piping Components in Healthcare

Figure 18. Global Data Center Liquid Cooling Piping Components Market: Healthcare (2021-2026) & (\$ millions)

Figure 19. Data Center Liquid Cooling Piping Components in Other

Figure 20. Global Data Center Liquid Cooling Piping Components Market: Other (2021-2026) & (\$ millions)

Figure 21. Global Data Center Liquid Cooling Piping Components Market Size Market Share by Application in 2025

Figure 22. Global Data Center Liquid Cooling Piping Components Revenue Market Share by Player in 2025

Figure 23. Global Data Center Liquid Cooling Piping Components Market Size Market Share by Region (2021-2026)

Figure 24. Americas Data Center Liquid Cooling Piping Components Market Size 2021-2026 (\$ millions)

Figure 25. APAC Data Center Liquid Cooling Piping Components Market Size 2021-2026 (\$ millions)

Figure 26. Europe Data Center Liquid Cooling Piping Components Market Size 2021-2026 (\$ millions)

Figure 27. Middle East & Africa Data Center Liquid Cooling Piping Components Market Size 2021-2026 (\$ millions)

Figure 28. Americas Data Center Liquid Cooling Piping Components Value Market Share by Country in 2025

Figure 29. United States Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 30. Canada Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 31. Mexico Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 32. Brazil Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 33. APAC Data Center Liquid Cooling Piping Components Market Size Market Share by Region in 2025

Figure 34. APAC Data Center Liquid Cooling Piping Components Market Size Market Share by Type (2021-2026)

Figure 35. APAC Data Center Liquid Cooling Piping Components Market Size Market Share by Application (2021-2026)

Figure 36. China Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 37. Japan Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 38. South Korea Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 39. Southeast Asia Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 40. India Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 41. Australia Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 42. Europe Data Center Liquid Cooling Piping Components Market Size Market

Share by Country in 2025

Figure 43. Europe Data Center Liquid Cooling Piping Components Market Size Market Share by Type (2021-2026)

Figure 44. Europe Data Center Liquid Cooling Piping Components Market Size Market Share by Application (2021-2026)

Figure 45. Germany Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 46. France Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 47. UK Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 48. Italy Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 49. Russia Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 50. Middle East & Africa Data Center Liquid Cooling Piping Components Market Size Market Share by Region (2021-2026)

Figure 51. Middle East & Africa Data Center Liquid Cooling Piping Components Market Size Market Share by Type (2021-2026)

Figure 52. Middle East & Africa Data Center Liquid Cooling Piping Components Market Size Market Share by Application (2021-2026)

Figure 53. Egypt Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 54. South Africa Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 55. Israel Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 56. Turkey Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 57. GCC Countries Data Center Liquid Cooling Piping Components Market Size Growth 2021-2026 (\$ millions)

Figure 58. Americas Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 59. APAC Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 60. Europe Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 61. Middle East & Africa Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 62. United States Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 63. Canada Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 64. Mexico Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 65. Brazil Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 66. China Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 67. Japan Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 68. Korea Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 69. Southeast Asia Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 70. India Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 71. Australia Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 72. Germany Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 73. France Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 74. UK Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 75. Italy Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 76. Russia Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 77. Egypt Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 78. South Africa Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 79. Israel Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 80. Turkey Data Center Liquid Cooling Piping Components Market Size 2027-2032 (\$ millions)

Figure 81. Global Data Center Liquid Cooling Piping Components Market Size Market

Share Forecast by Type (2027-2032)

Figure 82. Global Data Center Liquid Cooling Piping Components Market Size Market

Share Forecast by Application (2027-2032)

Figure 83. GCC Countries Data Center Liquid Cooling Piping Components Market Size
2027-2032 (\$ millions)

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