

Global Data Center Liquid Cooling Rack Manifold Market Growth 2026-2032

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Abstracts

The global Data Center Liquid Cooling Rack Manifold market size is predicted to grow from US\$ 251 million in 2025 to US\$ 1207 million in 2032; it is expected to grow at a CAGR of 21.6% from 2026 to 2032.

Data Center Liquid Cooling Rack Manifold refers to a rack-mounted coolant supply and return distribution assembly used in direct-to-chip liquid cooling systems for data centers. Installed inside, beside, or at the rear of an IT rack, the product connects the secondary coolant loop or coolant distribution unit with multiple server cold-plate circuits, enabling controlled coolant distribution, collection, venting, draining, isolation, and flow organization at rack level. A standard set generally consists of one supply manifold, one return manifold, branch interfaces, mounting hardware, valves, vents, drains, and factory-configured quick-disconnect components. Products are primarily available as hand-mate and blind-mate configurations, with vertical and horizontal installation structures for EIA 19-inch racks, Open Rack V3 systems, and proprietary high-density AI rack architectures. Main wetted-body materials include 304-series stainless steel, 316-series stainless steel, and qualified engineering polymers. Product specifications are differentiated by rack format, connection architecture, branch density, flow capacity, pressure rating, coolant compatibility, leakage performance, and optional pressure, temperature, or flow monitoring. The research focuses on complete rack-level manifold assemblies supplied for AI computing, high-performance computing, hyperscale cloud, colocation, enterprise, and public scientific computing facilities.

Key Findings

Global shipments reached approximately 85.6 thousand sets in 2025

2026 shipments are estimated at approximately 146.9 thousand sets

The 2026 average selling price is estimated near US\$2,600 per set

Hand-mate rack manifolds remain the largest connection-mode product segment

North America leads demand while Asia Pacific expands fastest

Twenty-seven verified supplier groups define the core competitive landscape

Market Trends

The Data Center Liquid Cooling Rack Manifold market is moving from project-specific pipe assemblies toward standardized, factory-tested rack subsystems. Product development is increasingly centered on higher branch density, reduced pressure loss, leak-free serviceability, modular installation, and compatibility with both conventional EIA racks and Open Rack V3 platforms. Hand-mate quick-disconnect designs remain the mainstream configuration because they support flexible deployment across existing rack architectures, while blind-mate manifolds are gaining strategic importance in pre-integrated AI racks where rapid server replacement and reduced maintenance intervention are required. Vertical zero-U mounting remains the preferred structure for high-density installations, although horizontal and proprietary integrated designs continue to serve specific server layouts. Stainless steel retains the dominant material position because of its mechanical durability, cleanliness, coolant compatibility, and established welding processes, while qualified polymer manifolds are emerging in applications that prioritize corrosion resistance and lower system weight. Sensor-ready designs, configurable top or bottom feed positions, drip-free couplings, and integrated vent and drain functions are becoming more common as customers shift procurement criteria from component price toward lifecycle reliability, deployment speed, and system-level serviceability.

Market Dynamics

Drivers

Rapid increases in rack power density are the primary demand driver for Data Center Liquid Cooling Rack Manifold products. AI training, inference, and high-performance computing platforms are concentrating more processors and accelerators within each rack, making air cooling increasingly difficult to scale without substantial energy and

space penalties. Rack manifolds provide the critical distribution interface between centralized coolant delivery equipment and server-level cold plates, so each new direct-to-chip liquid-cooled rack creates a corresponding requirement for a supply and return distribution assembly. Demand is also supported by the transition from isolated pilot projects to repeatable rack-scale deployment, particularly among hyperscale operators, server platform developers, colocation providers, and scientific computing centers. Broader adoption of standardized rack designs, factory-integrated liquid loops, and high-density server platforms reduces engineering lead time and improves customer confidence in liquid cooling. The product also benefits from its relatively low value compared with the processors and servers it protects, which encourages customers to prioritize reliable materials, validated connections, and redundant safety features rather than selecting solely on initial purchase price.

Restraints

Market expansion is constrained by the engineering complexity and qualification requirements associated with liquid distribution inside high-value computing racks. A manifold must maintain pressure integrity, stable branch flow, low leakage risk, acceptable pressure drop, coolant compatibility, corrosion resistance, and reliable operation through repeated connection cycles and thermal changes. The cost of drip-free quick disconnects, precision stainless-steel tubing, clean welding, internal surface treatment, pressure testing, helium leakage testing, and controlled assembly can be significant, especially for low-volume customized projects. Product specifications also vary among server platforms, rack formats, coolant chemistries, branch locations, and facility piping architectures, limiting the extent to which one standard design can serve all customers. Existing data centers may lack facility water, secondary-loop capacity, installation space, or operational procedures suitable for liquid cooling, slowing retrofits even where computing demand is strong. In addition, many manifolds are bundled into racks or complete cooling systems rather than purchased independently, reducing product-level price transparency and making supplier qualification, demand forecasting, and standalone revenue tracking more difficult.

Opportunities

The strongest opportunity lies in the standardization and industrialization of high-density AI rack platforms. Blind-mate connections, Open Rack V3 interfaces, modular manifold rails, and factory-integrated supply and return assemblies can reduce onsite piping work and enable faster replacement of liquid-cooled server trays. Suppliers with capabilities in manifold design, fluid simulation, precision fabrication, clean assembly,

leak testing, and rack-level validation can expand from component production into higher-value engineered subsystems. Further opportunities are emerging in sensor-integrated products that support pressure, temperature, flow, and leakage monitoring, as data center operators seek greater visibility into rack-level coolant performance. Polymer manifolds, lower-pressure-loss internal geometries, configurable branch modules, and designs compatible with different coolant formulations may open additional product niches. Geographic opportunities are also expanding as liquid cooling deployment moves beyond leading North American hyperscale projects into Asian AI infrastructure, European colocation facilities, sovereign computing projects, research clusters, and enterprise private data centers. Suppliers able to offer global manufacturing, localized technical support, and consistent qualification standards are likely to benefit as customers seek repeatable configurations across multiple data center regions.

Challenges

The industry's principal long-term challenge is achieving sufficient standardization without restricting product adaptation to different server and rack architectures. Connection position, branch quantity, flow demand, allowable pressure drop, rack height, quick-disconnect type, coolant chemistry, and maintenance philosophy can differ materially between customers. This creates a fragmented specification environment and increases tooling, testing, certification, and inventory requirements for manufacturers. Reliability failures can have disproportionate consequences because even a small leak, blockage, material incompatibility, or connection error may affect high-value computing equipment and interrupt critical workloads. Manufacturers must therefore balance cost reduction with conservative design, traceable materials, validated fabrication processes, and extensive qualification. Competitive pressure is also rising as global infrastructure groups, specialized liquid-cooling companies, server supply-chain manufacturers, and precision metal fabricators enter the market from different positions. Rapid capacity expansion could create temporary oversupply in standard products, while demand for specialized blind-mate and high-flow designs may remain constrained by customer-specific validation cycles. Supplier consolidation further increases the importance of platform access, global service capability, intellectual property, and long-term relationships with server OEMs and hyperscale customers.

Industry Chain Analysis

The upstream chain for Data Center Liquid Cooling Rack Manifold products includes stainless-steel tubing, engineering polymers, precision-machined fittings, valves, drip-

free quick disconnects, seals, sensors, mounting structures, and surface-treatment materials. Stainless steel and quick-disconnect assemblies account for a substantial portion of product cost in conventional high-port-count configurations, while engineering design, clean welding, internal surface quality, pressure testing, and leak detection contribute significant processing value. The use of qualified materials and fluid-compatible seals is critical because the manifold remains continuously exposed to water-based or glycol-based coolants under changing pressure and temperature conditions.

The midstream comprises manifold designers, liquid-cooling system manufacturers, precision fluid-component producers, and rack infrastructure suppliers. Value is created through hydraulic design, branch-flow optimization, compact packaging, rack compatibility, manufacturing consistency, and system qualification rather than through raw material conversion alone. Downstream customers include liquid-cooling solution providers, server rack integrators, server OEM and ODM companies, hyperscale cloud operators, colocation providers, enterprise data centers, and scientific computing institutions. Products may be sold as standalone assemblies, bundled with coolant distribution units and hose networks, or integrated into complete liquid-cooled racks. Margin differentiation is generally driven by customization, qualification depth, connection technology, validated reliability, delivery scale, and the supplier's ability to assume system-level performance responsibility.

Segment Insights

By connection mode, hand-mate rack manifolds represent the largest established segment because they can be deployed across a broad range of standard and customized racks without requiring a fully integrated blind-mate server interface. Their flexible hose and quick-disconnect architecture supports hyperscale installations, colocation deployments, enterprise retrofits, and scientific computing systems. Blind-mate rack manifolds are expected to be the faster-developing product direction as AI infrastructure shifts toward factory-integrated rack-scale platforms, standardized server trays, and simplified field maintenance. However, this segment requires tighter mechanical alignment, interface control, server-platform coordination, and qualification, which limits the number of suppliers capable of delivering complete solutions.

Vertical rack manifolds remain the dominant installation format because they use rear or side zero-U space and can distribute coolant across a large number of rack positions. High-port-count stainless-steel products form the core volume segment, particularly for conventional water and glycol direct-to-chip systems. Higher-grade stainless steel is used where corrosion resistance and coolant purity requirements are more demanding,

while qualified polymer products address weight, corrosion, and metal-ion concerns in selected projects. The market opportunity is shifting toward configurable product platforms that allow suppliers to change rack height, branch location, connection type, and feed direction without fully redesigning the manifold for every project.

Downstream Market Opportunities

Hyperscale cloud and AI computing facilities represent the principal downstream opportunity because their high rack density, standardized deployment patterns, and large project volumes support repeatable manifold designs and centralized supplier qualification. Colocation operators offer a second major opportunity as they upgrade facilities to accommodate high-density tenant workloads and seek modular cooling infrastructure that can be deployed without rebuilding entire data halls. Enterprise private computing centers, industrial simulation environments, universities, national laboratories, and public supercomputing facilities create a more diversified market for customized and medium-volume products. These customers typically place greater emphasis on compatibility with existing racks, retrofit flexibility, operational safety, and long service life. Longer-term demand will also arise from sovereign AI infrastructure, regional inference centers, modular data centers, and edge computing sites where liquid-cooled racks must be installed with limited onsite engineering resources. In these applications, preassembled and factory-tested manifold kits can reduce installation risk and help translate liquid-cooling technology from specialized engineering projects into repeatable infrastructure products.

Regional Insights

This study identifies North America as the largest demand region for Data Center Liquid Cooling Rack Manifold products, supported by hyperscale investment, AI computing deployments, established direct-liquid-cooling suppliers, and early adoption of rack-scale platforms. The region has also become a focal point for industry consolidation as infrastructure, water-treatment, power-management, and thermal-management groups expand into integrated data center cooling. Europe has a strong position in rack infrastructure, fluid-control engineering, colocation facilities, and Open Rack V3 development, with demand shaped by energy efficiency, facility constraints, and heat-reuse considerations. The region offers opportunities for standardized, serviceable products compatible with both new data centers and existing facilities.

Asia Pacific is expected to record the fastest expansion, driven by AI server manufacturing, precision fluid-component production, data center construction, and the

localization of liquid-cooling supply chains. China and China Taiwan form the region's principal manufacturing base, combining system suppliers, rack manufacturers, server supply-chain companies, and precision manifold producers. Japan and South Korea represent smaller but technically advanced markets focused on high-reliability computing and integrated thermal management. Southeast Asia and India are more important as emerging data center deployment and manufacturing locations than as established headquarters for independent rack manifold suppliers. Regional competitiveness will increasingly depend on the ability to combine Asian manufacturing scale with North American and European qualification, platform access, and customer support.

Competitive Landscape Analysis

The competitive landscape is moderately fragmented at the product level but is becoming more consolidated at the corporate-group level. Competition includes global data center infrastructure groups, specialized direct-liquid-cooling suppliers, rack and enclosure manufacturers, fluid-control companies, and Asian precision manufacturing businesses. Large integrated groups compete through global sales coverage, system-level product portfolios, engineering resources, customer qualification, and the ability to bundle rack manifolds with coolant distribution units, cold plates, hose assemblies, power infrastructure, and service capabilities. Specialized suppliers differentiate through hydraulic design, rapid customization, deployment experience, and close cooperation with server OEMs and hyperscale customers. Chinese and Chinese Taiwan manufacturers compete through precision fabrication, flexible engineering, shorter development cycles, and cost-effective scaled production, although product-level revenue disclosure remains limited. Recent acquisitions of CoolIT Systems by Ecolab, Boyd Thermal by Eaton, and Chillydyne by Daikin demonstrate a strategic shift toward integrated power, water, thermal-management, and data center infrastructure platforms. Future competition is therefore likely to depend less on the manifold as an isolated metal assembly and more on validated rack compatibility, connection technology, manufacturing quality, global delivery, and responsibility for the performance of the complete liquid-cooling loop.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the "Data Center Liquid Cooling Rack Manifold Industry Forecast" looks at past sales and reviews total world Data Center Liquid Cooling Rack Manifold sales in 2025, providing a comprehensive analysis by region and market sector of projected Data Center Liquid Cooling Rack Manifold

sales for 2026 through 2032. With Data Center Liquid Cooling Rack Manifold 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 Rack Manifold industry.

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

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

This report presents a comprehensive overview, market shares, and growth opportunities of Data Center Liquid Cooling Rack Manifold market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

304 Stainless Steel Rack Manifold

316 Stainless Steel Rack Manifold

PVDF Polymer Rack Manifold

Other

Segmentation by Rack Form Factor Compatibility:

EIA 19-Inch Rack Manifold

OCP Open Rack V3 Manifold

Dual-Standard Configurable Rack Manifold

Other

Segmentation by Application:

Hyperscale Cloud Provider Data Centers

Colocation Data Centers

Enterprise Private Data Centers

Public and Academic Computing Centers

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.

Ecolab Inc.

Vertiv Holdings Co.

Eaton Corporation plc

nVent Electric plc

Schneider Electric SE

Rittal GmbH & Co. KG

Georg Fischer AG

Kingspan Group plc

DCX Polska sp. z o.o.

Panduit Corp.

Amphenol Corporation

Daikin Industries, Ltd.

IMMERSEKOOL Co., Ltd.

Delta Electronics, Inc.

Shenzhen Envicool Technology Co., Ltd.

Guangzhou Goaland Energy Conservation Tech. Co., Ltd.

LINGYI iTECH GUANGDONG COMPANY

Shenzhen INVT Electric Co., Ltd.

ONOFF Electric Co., Inc.

Jiangsu Wuyang Automation Control Technology Co., Ltd.

AVIC Jonhon Optron Technology Co., Ltd.

Hefei Shuyi Digital Power Co., Ltd.

Sugon Data Infrastructure Innovation Technology Beijing Co., Ltd.

Forcecon Technology Co., Ltd.

Shin Zu Shing Co., Ltd.

Global Tek Fabrication Co., Ltd.

CerTone Heat Solution Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Data Center Liquid Cooling Rack Manifold market?

What factors are driving Data Center Liquid Cooling Rack Manifold market growth, globally and by region?

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

How do Data Center Liquid Cooling Rack Manifold market opportunities vary by end market size?

How does Data Center Liquid Cooling Rack Manifold break out by Type, by Application?

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