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Global Direct-to-Chip Liquid Cold Plates for AI Servers Market Growth 2026-2032

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Abstracts

The global Direct-to-Chip Liquid Cold Plates for AI Servers market size is predicted to grow from US$ 498 million in 2025 to US$ 2831 million in 2032; it is expected to grow at a CAGR of 23.0% from 2026 to 2032.

In 2025, global sales of direct-to-chip liquid cold plates for AI servers are estimated at approximately 2.91 million units, with an average selling price of about USD 175 per unit, corresponding to a market size of approximately USD 509.4 million. Direct-to-chip liquid cold plates for AI servers are chip-level liquid heat exchange components mounted directly on CPUs, GPUs, AI accelerators, memory modules, or other high-power board-level heat sources inside AI servers. These products are typically made of copper, aluminum, stainless steel, or composite metal structures, with internal cooling channels formed through machining, stamping, microchannel design, embedded tube structures, brazing, diffusion bonding, or additive manufacturing. By circulating coolant through the cold plate, they remove heat directly from high-power chips or board-level devices, enabling high-heat-flux cooling, chip temperature control, higher server power density, and reliable operation in AI training servers, AI inference servers, high-density GPU servers, AI accelerated computing servers, and high-power data center computing nodes.

Demand growth is mainly driven by three factors. First, rising shipments of AI training and inference servers are increasing demand for GPU cold plates, AI accelerator cold plates, and processor cold plates. Second, higher rack power density is pushing liquid cooling from an optional configuration toward a necessary solution for high-power AI clusters. Third, the adoption of GB200, GB300, and next-generation high-power AI computing platforms is increasing both the number of cold plates per server and the complexity of cold plate design. In the short term, the market will remain largely driven

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by customized projects from leading cloud service providers, server OEMs, and AI infrastructure customers. Product pricing will be influenced by structural complexity, material selection, flow channel design, sealing reliability, and customer qualification requirements. Over the medium to long term, as liquid-cooled server platforms become more standardized and Asian manufacturing supply chains mature, average selling prices are expected to decline, while volume growth and a higher share of advanced cold plates will continue to support market expansion.

From a competitive perspective, global suppliers are mainly concentrated in North America, Taiwan, Mainland China, Japan, and Europe. Companies such as CoolIT, Boyd, JetCool, Delta, Cooler Master, Nidec, Fujikura, Wieland, Asetek, Fabric8Labs, Envicool, FRD, Lingyi iTech, and Goaland have established visible product or business positions. Future competition will depend not only on cold plate manufacturing capability, but also on thermal resistance control, flow resistance design, microchannel structures, sealing reliability, material compatibility, batch-to-batch consistency, fast customization, and co-design capabilities with CDUs, manifolds, quick disconnects, and server platforms. Overall, direct-to-chip liquid cold plates for AI servers represent a high-value and strategically important component segment within the AI data center thermal management supply chain, with strong demand visibility, high customer qualification barriers, and clear opportunities linked to liquid cooling penetration, cold plate count per server, and supplier mass-production capability.

LP Information, Inc. (LPI) ' newest research report, the “Direct-to-Chip Liquid Cold Plates for AI Servers Industry Forecast” looks at past sales and reviews total world Direct-to-Chip Liquid Cold Plates for AI Servers sales in 2025, providing a comprehensive analysis by region and market sector of projected Direct-to-Chip Liquid Cold Plates for AI Servers sales for 2026 through 2032. With Direct-to-Chip Liquid Cold Plates for AI Servers sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Direct-to-Chip Liquid Cold Plates for AI Servers industry.

This Insight Report provides a comprehensive analysis of the global Direct-to-Chip Liquid Cold Plates for AI Servers 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 Direct-to-Chip Liquid Cold Plates for AI Servers portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Direct-to-Chip Liquid Cold Plates for AI Servers market.

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This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Direct-to-Chip Liquid Cold Plates for AI Servers 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 Direct-to-Chip Liquid Cold Plates for AI Servers.

This report presents a comprehensive overview, market shares, and growth opportunities of Direct-to-Chip Liquid Cold Plates for AI Servers market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Processor Cold Plates

AI Accelerator Cold Plates

Memory Module Cold Plates

Board-Level Component Cold Plates

Other

Segmentation by Heat Transfer Route:

Single-Phase Liquid Cold Plates

Two-Phase Liquid Cold Plates

Other

Segmentation by Manufacturing Technology:

Machined Cold Plates

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Stamped Cold Plates

Microchannel Cold Plates

Additively Manufactured Cold Plates

Other

Segmentation by Application:

AI Training

AI Inference

AI Fine-Tuning

AI High-Density Computing

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

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- 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.

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Ecolab Inc.

Eaton Corporation plc

Flex Ltd.

Advanced Thermal Solutions Inc.

Advanced Cooling Technologies Inc.

ZutaCore Inc.

Delta Electronics, Inc.

Cooler Master Technology Inc.

Asia Vital Components Co., Ltd.

Auras Technology Co., Ltd.

Nidec Corporation

Fujikura Ltd.

Wieland-Werke AG

Asetek A/S

Fabric8Labs Inc.

Envicool Technology Co., Ltd.

Shenzhen FRD Science and Technology Co., Ltd.

Guangdong Lingyi iTech Manufacturing Co., Ltd.

Guangzhou Goaland Energy Conservation Tech Co., Ltd.

Shenzhen Lori Technology Co.,Ltd.

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Key Questions Addressed in this Report

What is the 10-year outlook for the global Direct-to-Chip Liquid Cold Plates for AI Servers market?

What factors are driving Direct-to-Chip Liquid Cold Plates for AI Servers market growth, globally and by region?

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

How do Direct-to-Chip Liquid Cold Plates for AI Servers market opportunities vary by end market size?

How does Direct-to-Chip Liquid Cold Plates for AI Servers break out by Type, by Application?

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