

# Global Dry / Adiabatic Dry Coolers for High-Density Liquid-Cooled Data Centers Market Growth 2026-2032

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## Abstracts

The global Dry / Adiabatic Dry Coolers for High-Density Liquid-Cooled Data Centers market size is predicted to grow from US\$ 1154 million in 2025 to US\$ 5455 million in 2032; it is expected to grow at a CAGR of 23.7% from 2026 to 2032.

Dry and adiabatic dry coolers for high-density liquid-cooled data centers refer to outdoor air-side heat rejection equipment used to dissipate heat from closed-loop water or water-glycol circuits serving AI data centers, HPC clusters, hyperscale facilities and other high-density computing environments. These systems typically transfer heat from facility water loops, CDU primary circuits, chiller-free liquid cooling architectures or hybrid air-liquid cooling systems to ambient air through finned-tube coils, EC fans and intelligent controls. The product scope mainly covers 100% dry fluid coolers, V-bank or flatbed high-capacity dry coolers, adiabatic-assisted dry coolers, closed-circuit hybrid fluid coolers and modular air-cooled heat rejection platforms designed for scalable data center deployment. Their strategic function is to reduce reliance on continuous evaporative water consumption, extend free-cooling hours, support higher liquid supply temperatures, and provide an engineering-ready heat rejection backbone for high-density liquid cooling. Typical module capacities range from several hundred kilowatts to multiple megawatts, while large AI data center projects can aggregate many units into tens or hundreds of megawatts of heat rejection capacity. Indicative assessed prices vary materially by capacity, coil materials, redundancy, corrosion protection, adiabatic configuration and project delivery model, with many modular units broadly falling within a USD 150,000-800,000 range, while site-erected or heavily customised systems may exceed this range.

Based on our research, this subject should not be framed as a conventional ?cooling tower? market. It is more accurately understood as a specialised heat-rejection

equipment segment within the liquid-cooled AI data center infrastructure stack. As GPU clusters, HPC systems and hyperscale facilities move from room-level air cooling toward direct-to-chip liquid cooling and hybrid air-liquid architectures, heat is increasingly transferred into facility water or water-glycol loops. The critical engineering question is then how that heat can be rejected outdoors with high reliability, low water consumption and acceptable energy performance. Dry coolers, adiabatic dry coolers and closed-circuit fluid coolers are therefore becoming more strategically important, not because the equipment itself is new, but because their role in AI data center thermal architecture is becoming more central.

From a supply-side perspective, the competitive landscape is structured around three groups. The first group consists of established heat-rejection equipment manufacturers with deep expertise in coils, air-side heat exchangers, fluid coolers and large-scale project delivery. The second group consists of data center thermal management platform companies that can integrate chillers, dry coolers, CDUs, CRAH units, fan walls, controls and services into a complete operating architecture. The third group includes local and regional suppliers, particularly in China, that are moving from precision cooling and data center HVAC into full-chain liquid cooling systems, including primary-side heat rejection. This layered supply structure explains why the broad longlist is wider than the core formal list and why revenue transparency remains limited.

Demand growth is being driven by AI training clusters, high-density inference workloads, hyperscale cloud expansion and the need to improve water and energy performance. North America is currently the most important incremental market because of the scale of AI data center construction, while China is developing a domestic supply base around intelligent computing centers and telecom/cloud infrastructure. Europe is likely to emphasise dry and adiabatic heat rejection because of energy-efficiency requirements, noise constraints, water-use considerations and growing interest in heat reuse. The addressable market will therefore be shaped not only by server power density, but also by climate zone, water availability, grid constraints, redundancy requirements and local permitting conditions.

The market is expected to evolve toward hybrid architectures rather than a single dominant cooling technology. Dry coolers are highly attractive in water-constrained or cooler climates and in warm-water liquid cooling architectures, but they face performance limitations during hot ambient conditions. Adiabatic assistance, chiller-assisted backup, closed-loop fluid cooling, intelligent CDU controls and heat recovery will therefore coexist. The most competitive suppliers will be those able to optimise the full thermal chain from chip-level heat capture to facility-side heat rejection, rather than

simply selling standalone equipment. This favours companies with engineering depth, global manufacturing scale, service capability and the ability to support project-specific design.

LP Information, Inc. (LPI) ' newest research report, the "Dry / Adiabatic Dry Coolers for High-Density Liquid-Cooled Data Centers Industry Forecast" looks at past sales and reviews total world Dry / Adiabatic Dry Coolers for High-Density Liquid-Cooled Data Centers sales in 2025, providing a comprehensive analysis by region and market sector of projected Dry / Adiabatic Dry Coolers for High-Density Liquid-Cooled Data Centers sales for 2026 through 2032. With Dry / Adiabatic Dry Coolers for High-Density Liquid-Cooled Data Centers sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Dry / Adiabatic Dry Coolers for High-Density Liquid-Cooled Data Centers industry.

This Insight Report provides a comprehensive analysis of the global Dry / Adiabatic Dry Coolers for High-Density Liquid-Cooled Data Centers 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 Dry / Adiabatic Dry Coolers for High-Density Liquid-Cooled Data Centers portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Dry / Adiabatic Dry Coolers for High-Density Liquid-Cooled Data Centers market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Dry / Adiabatic Dry Coolers for High-Density Liquid-Cooled Data Centers and breaks down the forecast by Heat Rejection Equipment, 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 Dry / Adiabatic Dry Coolers for High-Density Liquid-Cooled Data Centers.

This report presents a comprehensive overview, market shares, and growth opportunities of Dry / Adiabatic Dry Coolers for High-Density Liquid-Cooled Data Centers market by product type, application, key manufacturers and key regions and countries.

Segmentation by Heat Rejection Equipment:

Dry Cooler

Adiabatic Dry Cooler

Closed-Circuit Fluid Cooler

Air-Cooled Chiller / Integrated Heat Rejection Module

Other

#### Segmentation by Heat Rejection Architecture:

Direct Dry Free Cooling

Adiabatic-Assisted Heat Rejection

Chiller-Assisted Hybrid Cooling

Other

#### Segmentation by Cooling Loop Interface:

Facility Water-Glycol Loop

CDU Primary Loop

Chilled Water Loop

Heat Recovery Loop

#### Segmentation by Deployment Format:

Factory-Assembled Modular Unit

Site-Erected Large Bay System

Containerised / Integrated Cooling Module

Rack / Row-Proximate LTA Unit

Other

#### Segmentation by Application:

Hyperscale AI Data Center

Colocation Data Center

HPC / Research Computing Facility

Enterprise Facility

Edge / Lab Facility

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.

Kelvion Holding GmbH

EVAPCO, Inc.

Vertiv Holdings Co

SPX Cooling Tech

Baltimore Aircoil Company

Johnson Controls

Airedale by Modine

Schneider Electric

STULZ GmbH

G?ntner GmbH & Co. KG

Munters Group AB

Carrier Global Corporation

Trane Technologies plc

Daikin Industries, Ltd.

Mitsubishi Electric Hydronics & IT Cooling Systems

Guangdong Shenling Environmental Systems

Shenzhen Envicool Technology

Kaltra GmbH

Nanjing Canatal

Yimikang Tech. Group

Delta Electronics

Colmac Coil

nVent Electric

#### Key Questions Addressed in this Report

What is the 10-year outlook for the global Dry / Adiabatic Dry Coolers for High-Density Liquid-Cooled Data Centers market?

What factors are driving Dry / Adiabatic Dry Coolers for High-Density Liquid-Cooled Data Centers market growth, globally and by region?

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

How do Dry / Adiabatic Dry Coolers for High-Density Liquid-Cooled Data Centers market opportunities vary by end market size?

How does Dry / Adiabatic Dry Coolers for High-Density Liquid-Cooled Data Centers break out by Heat Rejection Equipment, by Application?



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