

Global Full Liquid Cooling Plate System Market Growth 2026-2032

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Abstracts

The global Full Liquid Cooling Plate System market size is predicted to grow from US\$ 802 million in 2025 to US\$ 5022 million in 2032; it is expected to grow at a CAGR of 29.7% from 2026 to 2032.

Full Liquid Cooling Plate Systems use cold plates and sealed liquid loops to cool CPUs, GPUs, memory, networking chips, power modules, and other major heat-generating components inside servers, allowing most or nearly all system heat to be removed by liquid. A complete system generally includes multi-component cold plates, internal server tubing, quick disconnects, rack manifolds, coolant distribution units, heat exchangers, filtration and refill devices, leak detection, and intelligent controls. Major applications include artificial intelligence, high-performance computing, cloud data centers, and scientific computing environments with extremely high power density. Key upstream inputs include copper or aluminum cold plates, microchannel components, pumps, valves, heat exchangers, sensors, quick disconnects, seals, and coolants, while major downstream customers include data center operators, cloud and AI computing providers, HPC and research institutions, and telecom and enterprise customers. On a standardized fully liquid-cooled rack-equivalent basis, global effective annual production capacity was approximately 5,600 systems in 2025, sales reached about 4,370 systems, the average ex-factory price was approximately USD 187,600 per system, and the estimated industry gross margin was approximately 27%–40%.

The global Full Liquid Cooling Plate System market is expanding from customized high-performance computing technology into AI infrastructure and high-density cloud data centers. As the power consumption of GPUs, AI accelerators, memory, and networking components increases simultaneously, cooling only CPUs and GPUs is becoming insufficient for managing total rack heat. Full liquid cooling extends coverage to

memory, power supplies, networking chips, and voltage regulation modules, significantly reducing residual air-cooling demand and enabling higher server and rack power density. Current adoption remains concentrated in large AI clusters, supercomputing centers, and leading cloud service providers, while deployment in conventional enterprise data centers remains limited.

Technology is shifting from localized processor cooling toward coordinated liquid cooling of multiple server components. Cooling coverage, component compatibility, and system-level flow control are becoming important performance indicators. As the number of cold plates inside each server increases, pressure drop, flow balance, material compatibility, and leakage prevention become more complex, encouraging integrated design across cold plates, manifolds, quick disconnects, coolant distribution units, and control software. Single-phase water-based cooling remains the dominant architecture, while pumped two-phase technology is gradually being validated for higher heat-flux applications. Future competition will move beyond individual cold plate performance toward end-to-end coordination from the server to the rack and facility.

Market growth is being driven by the expansion of AI training and inference clusters, rising rack power density, stricter data center energy-efficiency requirements, and increased investment in high-performance computing. Full-system liquid cooling can reduce demand for server fans and room-level air cooling, lower the space occupied by cooling equipment, and improve the feasibility of heat reuse. As server manufacturers integrate cold plates and liquid loops during product design and data centers install facility-water systems during construction, deployment and integration complexity is expected to decline. Further standardization of interfaces, coolant parameters, and monitoring protocols will also support the transition from customized projects to scalable delivery.

The industry still faces constraints related to high initial investment, differences among server platforms, changing maintenance procedures, and inconsistent technical standards. Compared with conventional cold plate cooling, full liquid cooling involves more cold plates, tubing, and connection points, placing higher requirements on leakage control, flow distribution, and online maintenance. Liquid cooling designs for power supplies, storage devices, and optical components are also not yet fully standardized. Existing data centers frequently lack facility-water networks, resulting in high retrofit costs and engineering complexity. Future expansion will depend on greater availability of fully liquid-cooled servers, standardized interfaces, proven long-term reliability, and stronger lifecycle economics compared with conventional air cooling and partial liquid cooling alternatives.

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

This Insight Report provides a comprehensive analysis of the global Full Liquid Cooling Plate System 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 Full Liquid Cooling Plate System portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Full Liquid Cooling Plate System market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Full Liquid Cooling Plate System 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 Full Liquid Cooling Plate System.

This report presents a comprehensive overview, market shares, and growth opportunities of Full Liquid Cooling Plate System market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Single-phase Cold Plate Cooling

Pumped Two-phase Cold Plate Cooling

Segmentation by System Configuration:

Server-level Systems

Rack-level Systems

Row-level Systems

Other

Segmentation by Cooling Capacity:

Below 100 kW

100–499 kW

500–999 kW

1 MW and Above

Segmentation by Application:

Data Center Operators

Cloud and AI Computing Providers

HPC and Research Institutions

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.

Lenovo

Supermicro

Hewlett Packard Enterprise

Dell Technologies

Eviden

Schneider Electric

Vertiv

CoolIT Systems

Eaton

nVent

Delta Electronics

Envicool

Inspur

Sugon Data Energy

Key Questions Addressed in this Report

What is the 10-year outlook for the global Full Liquid Cooling Plate System market?

What factors are driving Full Liquid Cooling Plate System market growth, globally and by region?

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

How do Full Liquid Cooling Plate System market opportunities vary by end market size?

How does Full Liquid Cooling Plate System break out by Type, by Application?

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