

# Global Fully Liquid-cooled Charging Pile Market Growth 2026-2032

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## Abstracts

The global Fully Liquid-cooled Charging Pile market size is predicted to grow from US\$ 720 million in 2025 to US\$ 4628 million in 2032; it is expected to grow at a CAGR of 30.8% from 2026 to 2032.

A fully liquid-cooled charging pile is a DC fast charging unit for electric vehicles that employs a comprehensive liquid cooling system to manage the temperature of internal power electronic components, interconnects, and the charging gun, ensuring thermal stability under high current and high power operating conditions to improve charging efficiency and safety. This product addresses the limitations of traditional air cooling or partial liquid cooling approaches, which can suffer from heat accumulation, power reduction, overheating protection triggers, and shortened equipment life during sustained high-power output, by providing a more reliable and consistent high-performance charging experience. The evolution of fully liquid-cooled charging piles began with the surge in demand for ultra-fast charging and the widespread adoption of long-range EVs; as high-performance semiconductor devices, power electronic modules, advanced heat exchange materials, and liquid cooling loop technologies have matured, the full liquid cooling architecture has become a key technical pathway in high-power charging. Upstream raw materials and components include high-thermal-conductivity coolant fluids, liquid cooling piping and fittings, power semiconductors (such as SiC MOSFETs and IGBTs), high-conductivity interconnects, precision sensors, and control modules, supported by liquid cooling system manufacturers, power electronics suppliers, thermal management material providers, and intelligent control solution developers. In 2025, the global production capacity of fully liquid-cooled charging piles reached 30,000 units, with sales totaling 21,453 units. The average unit price was USD 34,285, and the gross profit margin of enterprises ranged between 30% and 40%.

The market for fully liquid-cooled charging piles is currently evolving rapidly as the broader EV industry shifts toward higher-power fast charging. With growing expectations from users for faster, more stable charging—especially in applications such as long-distance travel, fleet operations, and high-utilization environments—conventional cooling approaches have shown limitations in maintaining sustained high-power output. This has driven fully liquid-cooled solutions to gain prominence as a key technical pathway in high-power charging infrastructure. Across the ecosystem, stakeholders are deepening collaboration around thermal management systems, power electronics integration, intelligent control, and safety strategies, gradually forming a more complete technology ecosystem. At the same time, challenges such as incomplete harmonization of standards, limited interoperability across suppliers, and adaptation to diverse deployment scenarios remain, requiring coordinated efforts to improve market adoption and deployment efficiency.

Looking ahead, fully liquid-cooled charging piles are expected to deepen their application footprint as technology maturity and supporting infrastructure continue to advance. Progress in high-performance thermal management materials, next-generation power semiconductor devices, modular system design, and intelligent energy management will further enhance reliability and efficiency, enabling broader deployment at strategic nodes such as highway corridors and logistics hubs. In parallel, trends in renewable energy integration, grid dispatch coordination, energy storage, and vehicle-to-grid interaction will provide more flexible and greener energy support for high-power charging. As international and regional charging standards converge and mature solutions see wider implementation, liquid-cooled technology is positioned to drive the high-power charging ecosystem toward greater efficiency and intelligence.

The forces propelling the development of fully liquid-cooled charging piles include policy support, user demand for superior charging experiences, accumulated industry technology, and innovation in business models. Policy frameworks that guide infrastructure development and raise energy efficiency standards give clear direction for investment and innovation; user expectations for fast, stable, and reliable charging also motivate continuous optimization of technical solutions. Breakthroughs in core components such as thermal management, power electronics, and smart control enhance product competitiveness, and closer collaboration between infrastructure operators and vehicle manufacturers accelerates real-world deployment. Yet challenges remain in cost control, ensuring high-power operational safety, interoperability across standards, and grid capacity to support localized high-power demand. Addressing these through multi-party collaboration, sustained technological

progress, and targeted policy support will be key to removing barriers and fostering sustainable long-term growth for fully liquid-cooled charging technology.

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

This Insight Report provides a comprehensive analysis of the global Fully Liquid-cooled Charging Pile 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 Fully Liquid-cooled Charging Pile portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Fully Liquid-cooled Charging Pile market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Fully Liquid-cooled Charging Pile 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 Fully Liquid-cooled Charging Pile.

This report presents a comprehensive overview, market shares, and growth opportunities of Fully Liquid-cooled Charging Pile market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

High Power (150-350 kW)

Ultra-High Power (350-500 kW)

Megawatt Level (500-1000 kW)

Multi-Megawatt Level (>1000 kW)

Segmentation by Deployment Mode:

Standalone Charging Station

Charging Hub Charging Station

Energy Storage Integrated Charging Station

Segmentation by Application:

Highway Service Station

Logistics Hub

Public Transit Hub

Commercial Parking Area

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.

BYD

Huawei Digital Power

Kempower

ABB

Siemens

KSTAR

TELD

Sungrow

Sinexcel

EN Plus

StarCharge

Tritium

Alpitronic

MIDA EV Power

Teison

MaxPower

## **Key Questions Addressed in this Report**

What is the 10-year outlook for the global Fully Liquid-cooled Charging Pile market?

What factors are driving Fully Liquid-cooled Charging Pile market growth,

globally and by region?

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

How do Fully Liquid-cooled Charging Pile market opportunities vary by end market size?

How does Fully Liquid-cooled Charging Pile break out by Type, by Application?

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