

Global In-Row Coolers Market Growth 2026-2032

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Abstracts

The global In-Row Coolers market size is predicted to grow from US\$ 3813 million in 2025 to US\$ 6556 million in 2032; it is expected to grow at a CAGR of 8.1% from 2026 to 2032.

In-Row Coolers are close-coupled precision cooling products installed between server racks, designed to remove heat at the source and improve cooling efficiency in medium- to high-density data centers. In 2025, global In-Row Coolers production reached approximately 102,600 units, with an average global market price of around US\$ 38,000 per unit. Monthly production capacity is 120 units per line. Gross Profit Margin: 32%. The industry chain of In-Row Coolers begins with upstream suppliers of compressors, heat exchangers, fans, control electronics, and sheet metal components. Midstream manufacturers integrate these core components into standardized or customized in-row cooling units, conducting system design, assembly, and reliability testing. Downstream, products are delivered through direct sales to data center owners, hyperscale cloud providers, and system integrators, often bundled with overall data center cooling or infrastructure projects. In-Row Coolers represent a transitional but highly practical cooling product in the evolution of data center thermal management. They effectively bridge the gap between traditional room-level cooling and advanced liquid cooling, offering a balanced solution for operators facing rising rack densities without fully redesigning their facilities. While their long-term role may be constrained by liquid cooling adoption in ultra-high-density AI data centers, In-Row Coolers will remain a stable and essential choice for retrofit projects and mid- to high-density environments.

United States market for In-Row Coolers is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for In-Row Coolers is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for In-Row Coolers is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key In-Row Coolers players cover Schneider Electric, Vertiv, Stulz, Rittal, Huawei, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for In-Row Coolers and breaks down the forecast by Cooling Method, 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 In-Row Coolers.

This report presents a comprehensive overview, market shares, and growth opportunities of In-Row Coolers market by product type, application, key manufacturers and key regions and countries.

Segmentation by Cooling Method:

Chilled Water In-Row Coolers

Direct Expansion (DX) In-Row Coolers

Refrigerant-Based In-Row Coolers

Segmentation by Cooling Density:

Standard-Density

High-Density

Segmentation by Application:

Enterprise Data Centers

Hyperscale Data Centers

AI / HPC Data Centers

Edge Data Centers

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.

Schneider Electric

Vertiv

Stulz

Rittal

Huawei

Delta Electronics

Johnson Controls

Daikin

Mitsubishi Electric

Toshiba Carrier

LG Electronics

Hitachi

Fujitsu General

Munters

Canatal

Airedale By Modine

Climaveneta

Blue Box Group

HiRef

Iceotope

Key Questions Addressed in this Report

What is the 10-year outlook for the global In-Row Coolers market?

What factors are driving In-Row Coolers market growth, globally and by region?

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

How do In-Row Coolers market opportunities vary by end market size?

How does In-Row Coolers break out by Cooling Method, by Application?

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