

Global Liquid Cold Plates for Energy Storage PCS Market Growth 2026-2032

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Abstracts

The global Liquid Cold Plates for Energy Storage PCS market size is predicted to grow from US\$ 90.00 million in 2025 to US\$ 281 million in 2032; it is expected to grow at a CAGR of 15.4% from 2026 to 2032.

Liquid Cold Plates for Energy Storage PCS are metal thermal management components used for cooling power conversion systems, bidirectional converters, energy storage inverters, IGBT modules, SiC power modules and related power electronics inside battery energy storage systems. The product mainly covers aluminum alloy cold plates, copper aluminum composite cold plates, stainless steel cold plates, brazed cold plates, vacuum brazed cold plates, friction stir welded cold plates, embedded tube cold plates, extruded channel cold plates and customized power module cold plates. A cold plate is mounted close to or directly onto heat generating power electronics and transfers waste heat into a circulating coolant, which is consistent with the common technical definition of liquid cold plates in power electronics cooling. Its manufacturing process usually includes metal forming, machining, internal channel design, brazing or welding, surface treatment, sealing, pressure testing and cleanliness control. Key specifications include plate size, channel design, coolant flow rate, pressure resistance, thermal resistance, heat dissipation capacity, flatness, leakage rate, corrosion resistance, insulation clearance and mechanical compatibility with converter power modules. The product is mainly used in grid scale energy storage PCS cabinets, containerized energy storage systems, renewable energy storage converters, industrial and commercial storage systems and high power bidirectional power conversion equipment. In 2025, global shipment volume of Liquid Cold Plates for Energy Storage PCS is estimated at about 0.74 million units, with an industry average selling price of about USD 125 per unit and an industry average gross margin of about 30%.

Liquid Cold Plates for Energy Storage PCS represent a specialized thermal management component within the power electronics supply chain rather than a complete energy storage product. The upstream chain includes aluminum, copper, stainless steel, brazing materials, sealing materials, coolant compatible materials, CNC equipment, welding equipment and leak testing systems. The midstream segment covers cold plate design, channel optimization, brazing, friction stir welding, machining, cleaning, pressure testing and reliability validation. Downstream demand mainly comes from energy storage PCS, bidirectional converters, energy storage inverters, renewable energy storage systems and high power power conversion units. As energy storage systems move toward higher power density, larger containerized architecture and stricter safety requirements, liquid cooling is becoming more important for PCS thermal control, especially where high heat flux IGBT or SiC modules need stable operating temperatures. The competitive landscape is shaped by two groups of suppliers. International players are stronger in high power electronics cold plates, IGBT cold plates, customized thermal solutions and advanced joining processes, while Chinese suppliers benefit from the rapid expansion of energy storage, charging infrastructure and new energy vehicle thermal management supply chains. The industry is moving from general metal cooling plates toward application specific PCS cold plates with better flatness, lower thermal resistance, tighter leak control and improved manufacturability. Capacity investment is mainly concentrated in brazing lines, automated cleaning, pressure testing, machining and module level validation. Some suppliers are also using acquisitions, production line upgrades and cross application expansion to enter higher value power electronics cooling scenarios. Policy and demand conditions remain supportive. Grid flexibility, renewable energy integration, industrial and commercial storage deployment and battery energy storage investment continue to expand the installed base of PCS equipment. The global battery storage sector added 108 GW of capacity in 2025, showing the strength of the downstream market that indirectly supports PCS cooling components. The long term outlook is positive but not without pressure. Growth will be driven by higher liquid cooled PCS penetration, wider use of SiC power devices, higher cycling intensity and stricter reliability requirements. At the same time, pricing pressure, customer designated manufacturing, regional supply chain localization and competition from battery cold plate suppliers may limit margin expansion.

LP Information, Inc. (LPI) ' newest research report, the "Liquid Cold Plates for Energy Storage PCS Industry Forecast" looks at past sales and reviews total world Liquid Cold Plates for Energy Storage PCS sales in 2025, providing a comprehensive analysis by region and market sector of projected Liquid Cold Plates for Energy Storage PCS sales for 2026 through 2032. With Liquid Cold Plates for Energy Storage PCS sales broken

down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Liquid Cold Plates for Energy Storage PCS industry.

This Insight Report provides a comprehensive analysis of the global Liquid Cold Plates for Energy Storage PCS 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 Liquid Cold Plates for Energy Storage PCS portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Liquid Cold Plates for Energy Storage PCS market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Liquid Cold Plates for Energy Storage PCS and breaks down the forecast by Base Material, 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 Liquid Cold Plates for Energy Storage PCS.

This report presents a comprehensive overview, market shares, and growth opportunities of Liquid Cold Plates for Energy Storage PCS market by product type, application, key manufacturers and key regions and countries.

Segmentation by Base Material:

Aluminum Cold Plates

Copper Cold Plates

Copper Aluminum Composite Cold Plates

Stainless Steel Cold Plates

Others

Segmentation by Manufacturing Process:

Stamping and Brazing

Vacuum Brazing

Friction Stir Welding

CNC Machining and Sealing

Extrusion and End Sealing

Others

Segmentation by Cooling Channel Design:

Straight Channel

Serpentine Channel

Microchannel

Pin-fin

Hybrid

Others

Segmentation by Application:

Grid Storage

C&I Storage

Charging Infrastructure

Industrial Power

Others

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.

Eaton Corporation

Wieland Microcool

Mersen

Wakefield Thermal

Advanced Cooling Technologies

Advanced Thermal Solutions

Innovative Thermal Solutions

Radian Thermal Products

AVIC Jonhon Optronic Technology Co., Ltd.

Changzhou HeatCreate Thermal Management System Co., Ltd.

Shenzhen FRD Science and Technology Co., Ltd.

Envicool Technology Co., Ltd.

Nabaichuan New Energy Co., Ltd.

Suzhou Ruidaike Thermal Technology Co., Ltd.

Sanhua Automotive

Zhejiang Yinlun Machinery Co., Ltd.

Anhui Wenxuan New Energy Thermal Management System Co., Ltd.

Dongguan Meijie Metal Products Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Liquid Cold Plates for Energy Storage PCS market?

What factors are driving Liquid Cold Plates for Energy Storage PCS market growth, globally and by region?

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

How do Liquid Cold Plates for Energy Storage PCS market opportunities vary by end market size?

How does Liquid Cold Plates for Energy Storage PCS break out by Base Material, by Application?

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