

Global Non-contact Liquid Cooling System Market Growth 2026-2032

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Abstracts

The global Non-contact Liquid Cooling System market size is predicted to grow from US\$ 3081 million in 2025 to US\$ 15533 million in 2032; it is expected to grow at a CAGR of 25.7% from 2026 to 2032.

Non-contact Liquid Cooling Systems transfer heat from CPUs, GPUs, and other high-power components through metal cold plates containing circulating coolant. The coolant does not come into direct contact with chips, circuit boards, or other electronic components. A complete system generally includes cold plates, hoses, quick disconnects, rack manifolds, coolant distribution units, heat exchangers, pumps, valves, filtration and refill devices, leak detection, and control systems. Major applications include artificial intelligence, high-performance computing, cloud data centers, colocation facilities, and telecom edge computing. 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 rack-equivalent system basis, global effective annual production capacity reached approximately 31,800 systems in 2025, sales totaled about 24,760 systems, the average ex-factory price was approximately USD 127,200 per system, and the estimated industry gross margin was approximately 25%–38%.

The global Non-contact Liquid Cooling System market is expanding rapidly from specialized high-performance computing applications into AI and mainstream data center infrastructure. As the power consumption of GPUs, AI accelerators, and high-performance processors continues to increase, conventional air cooling faces clear limitations in heat-removal capacity, energy efficiency, and space utilization within high-

density racks. Cold plate cooling removes heat directly from major thermal sources while preserving familiar server structures and maintenance practices, making it one of the most widely adopted liquid cooling architectures for AI data centers. Current demand is concentrated in new AI computing centers, hyperscale cloud facilities, and HPC clusters, while existing data centers generally adopt liquid-to-air CDUs or hybrid air-liquid configurations for targeted retrofits.

Technology is evolving from basic CPU-only cold plates toward high-coverage systems that cool GPUs, memory, networking chips, and other heat-generating components. CDU capacity is increasing, with product formats expanding from rack-based units to row-level and facility-level platforms. New systems place greater emphasis on redundant pumps, online filtration, automatic fluid replenishment, dynamic flow control, and leak detection. Single-phase water-based cold plate cooling remains the dominant architecture, while pumped two-phase cold plate technology is gradually gaining validation in ultra-high heat-flux environments. Future competition will increasingly focus on cold plate thermal resistance, flow distribution, connection reliability, system pressure drop, liquid cooling coverage, and end-to-end control capabilities.

Market growth is driven by investment in AI training and inference infrastructure, rising rack power density, stronger data center energy-efficiency requirements, and the maturation of the liquid-cooled server supply chain. Server, processor, cold plate, connector, and CDU suppliers are strengthening collaborative design, shifting liquid cooling from aftermarket modification toward native server integration. Standardized coolant interfaces, rack manifolds, and facility-water parameters can reduce integration complexity and support a transition from customized projects to scalable products. As more new data centers incorporate facility-water infrastructure during the design stage, deployment costs and engineering complexity are expected to decline gradually.

The industry still faces challenges related to high upfront investment, inconsistent interface standards, leakage risk, and the difficulty of retrofitting existing facilities. Server platforms differ in cold plate structures, flow rates, pressure requirements, material compatibility, and quick-disconnect specifications, increasing validation and spare-parts management costs. Cold plate systems generally do not remove all residual server heat and therefore still require supplementary air cooling or rear-door heat exchangers, adding complexity to overall system design. Future suppliers will need to demonstrate reliability and lifecycle economics through scaled manufacturing, complete system portfolios, redundant and leak-resistant designs, standardized interfaces, and long-term operating data.

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

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

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

This report presents a comprehensive overview, market shares, and growth opportunities of Non-contact Liquid Cooling 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:

Cold Plate and Loop Systems

Rack-level Cooling Systems

Row-level Cooling 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.

Schneider Electric

Vertiv

Eaton

CoolIT Systems

nVent

Delta Electronics

STULZ

ZutaCore

Accelsius

Lenovo

Supermicro

Envicool

Inspur

Sugon Data Energy

Key Questions Addressed in this Report

What is the 10-year outlook for the global Non-contact Liquid Cooling System market?

What factors are driving Non-contact Liquid Cooling System market growth, globally and by region?

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

How do Non-contact Liquid Cooling System market opportunities vary by end market size?

How does Non-contact Liquid Cooling System break out by Type, by Application?

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