

Global Rack-Scale AI Integrated Systems Market Growth 2026-2032

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Abstracts

The global Rack-Scale AI Integrated Systems market size is predicted to grow from US\$ 60162 million in 2025 to US\$ 268393 million in 2032; it is expected to grow at a CAGR of 18.9% from 2026 to 2032.

Rack-Scale AI Integrated Systems refer to factory-integrated, rack-level or multi-rack AI computing systems designed for large language model training, real-time inference, high-performance computing, and AI factory deployments. These systems integrate AI accelerators, CPU/GPU/NPU compute trays, high-speed scale-up and scale-out networking, power distribution, liquid-cooling architecture, cabinet management, cabling, monitoring, and deployment services into a validated rack-scale delivery unit. The defining feature is not a standalone AI server, but a pre-engineered rack or rack cluster in which compute, networking, power, cooling, and management are co-designed to support high-density AI workloads. Current high-end systems such as NVIDIA GB200 / GB300 NVL72 use rack-scale liquid-cooled architectures with large GPU domains, while China-oriented systems increasingly combine domestic AI accelerators, supernode architectures, liquid cooling, and integrated cabinet delivery.

Commercial pricing is normally assessed per rack, per integrated cabinet, or per multi-rack cluster, with premium systems reaching multi-million-dollar levels depending on accelerator type, memory configuration, interconnect fabric, cooling method, and service scope.

Based on our research, Rack-Scale AI Integrated Systems represent a structural shift from server-level procurement to rack-level, factory-integrated AI infrastructure delivery. The market is not merely an extension of conventional server racks or standalone GPU servers. It is defined by the integration of AI accelerators, CPU/GPU/NPU compute

trays, scale-up interconnects, networking, power distribution, liquid cooling, cabinet management, software control, and deployment services into a validated rack-scale unit. The relevant statistical boundary should therefore focus on rack-level AI compute systems and exclude cloud rental revenue, facility construction, standalone cooling components, and ordinary single-node AI servers.

From a supply-side perspective, the global market is shaped by four major groups: U.S.-led platform architecture, Taiwan-based ODM manufacturing, global OEM-branded delivery, and China's domestic supernode ecosystem. NVIDIA's GB200 / GB300 NVL72 architecture has become the most visible high-end reference point for rack-scale AI systems. Dell, HPE, Lenovo, and Supermicro focus on branded enterprise and cloud-scale deployments, while Quanta/QCT, Wistron, Hon Hai/Ingrasys, Wistron, Inventec, and Pegatron play critical roles in rack-level manufacturing, integration, validation, and supply-chain execution. In China, Huawei, xFusion, H3C, Inspur, and Dawning are developing an alternative supply base around domestic accelerators, liquid-cooled cabinets, supernode architectures, and intelligent computing center deployments.

Demand growth is driven by large-model training, high-throughput inference, sovereign AI, AI cloud expansion, telecom and enterprise AI infrastructure, and HPC-AI convergence. Buyers are moving away from purchasing isolated GPU servers and toward integrated systems that reduce deployment complexity, improve interconnect efficiency, simplify cooling and power design, and shorten time-to-production. The commercial value of the rack-scale system lies in its ability to convert chip-level performance into deployable, manageable, and scalable AI infrastructure at data-center scale.

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

This Insight Report provides a comprehensive analysis of the global Rack-Scale AI Integrated Systems 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 Rack-Scale AI Integrated Systems portfolios and capabilities, market entry

strategies, market positions, and geographic footprints, to better understand these firms? unique position in an accelerating global Rack-Scale AI Integrated Systems market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Rack-Scale AI Integrated Systems and breaks down the forecast by System Architecture, 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 Rack-Scale AI Integrated Systems.

This report presents a comprehensive overview, market shares, and growth opportunities of Rack-Scale AI Integrated Systems market by product type, application, key manufacturers and key regions and countries.

Segmentation by System Architecture:

- NVIDIA NVL Rack-Scale System
- Domestic AI Supernode System
- Open / Multi-Accelerator Rack System
- Other

Segmentation by Cooling Method:

- Direct Liquid-Cooled Rack
- Hybrid Air-Liquid Rack
- Rear-Door / Cabinet-Assisted Cooling Rack
- Other

Segmentation by Accelerator Ecosystem:

NVIDIA GPU-Based System

Domestic NPU / GPU-Based System

Multi-Vendor Accelerator System

Other

Segmentation by Delivery Model:

Factory-Integrated Rack

On-Site Integrated Rack Cluster

Reference Design / Partner-Built Rack

Other

Segmentation by Application:

Large Model Training

High-Throughput Inference

AI Cloud / GPU Cloud

Enterprise AI Infrastructure

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.

NVIDIA Corporation

Dell Technologies Inc.

HPE

Supermicro

Lenovo Group

Quanta

Wiwynn Corporation

Hon Hai

Wistron Corporation

Inventec Corporation

Pegatron Corporation

GIGA-BYTE

ASUS

ASRock Rack

xFusion

H3C

Huawei Technologies

Aivres Systems

Key Questions Addressed in this Report

What is the 10-year outlook for the global Rack-Scale AI Integrated Systems market?

What factors are driving Rack-Scale AI Integrated Systems market growth, globally and by region?

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

How do Rack-Scale AI Integrated Systems market opportunities vary by end market size?

How does Rack-Scale AI Integrated Systems break out by System Architecture, by Application?

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