

Global Sustainable AI Data Center Infrastructure Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Sustainable AI Data Center Infrastructure market size is predicted to grow from US\$ 47543 million in 2025 to US\$ 176444 million in 2032; it is expected to grow at a CAGR of 18.9% from 2026 to 2032.

Sustainable AI Data Center Infrastructure refers to the set of engineered products, integrated systems, software platforms and lifecycle services that enable AI training, AI inference, high-performance computing and dense GPU clusters to operate with higher energy efficiency, lower water intensity, improved carbon transparency and greater facility resilience. The scope primarily covers high-density power distribution, UPS systems, switchgear, PDUs, busways, medium- and low-voltage electrical systems, HVDC architectures, coolant distribution units, cold plates, immersion tanks, rear-door heat exchangers, dry coolers, CRAH/CRAC systems, heat exchangers, dielectric fluids, prefabricated modular data centers, AI compute pods, DCIM, BMS, energy management software, carbon and water monitoring platforms, battery energy storage, fuel cells, standby generation and microgrid integration for AI data center environments. The defining technical features of this market are high rack power density, thermal stability, low PUE, low WUE, modular scalability, shortened deployment cycles, digital monitoring and lifecycle reliability.

Indicative pricing varies significantly by configuration: rack-level or row-level CDUs may range from tens of thousands to several hundred thousand US dollars, immersion cooling tanks and prefabricated power/cooling modules are typically project-priced from hundreds of thousands to several million US dollars, while large AI data center power and cooling packages can reach tens or hundreds of millions of US dollars depending on capacity and redundancy requirements.

Based on our research, Sustainable AI Data Center Infrastructure should be understood as a facility-level systems market rather than a generic green IT theme. The market is being shaped by the structural mismatch between rapidly rising AI compute density and legacy data center power and cooling architectures. Conventional data center efficiency programs were largely built around PUE improvement, redundancy, space utilisation and mechanical-electrical reliability. AI data centers add a more demanding layer: dense GPU clusters, sharply higher rack power, dynamic load profiles, liquid-cooling interfaces, grid-connection constraints, shortened deployment cycles and mounting transparency requirements around energy and water use. The IEA's outlook for data center electricity demand and the European Union's energy-performance reporting framework both point to a market in which efficiency, resilience and sustainability are becoming hard infrastructure requirements rather than discretionary ESG attributes.

From a supply-side perspective, the competitive landscape is becoming multi-layered. Global electrical and automation groups, critical digital infrastructure providers, precision cooling companies, specialist liquid-cooling vendors, Asian AI hardware supply chains and on-site power solution providers are converging around the same demand pool. Schneider Electric, Vertiv, Eaton, ABB, Legrand, Johnson Controls, Trane and Carrier bring scale, global service networks and integrated power-cooling capabilities. CoolIT, Submer, LiquidStack, Motivair, Envicool and other specialists bring deeper technology exposure to CDUs, cold plates, immersion systems and high-density liquid-cooling architectures. The recent strategic acquisitions and proposed acquisitions of liquid-cooling assets show that the market is moving from experimentation into industrial consolidation.

Regionally, North America remains the strongest demand and innovation centre for AI data center build-out, liquid-cooling start-ups and on-site power solutions. Europe retains advantages in electrification, precision cooling, enclosure systems, controls and regulatory-driven sustainability. China is building a rapidly expanding domestic ecosystem around intelligent computing centers, liquid cooling, modular facilities and digital energy infrastructure. Taiwan is particularly important in the AI hardware supply chain, where power modules, thermal components, rack-scale systems and ODM relationships connect facility requirements with server and accelerator design. Over the next cycle, competition will be determined less by single-product pricing and more by deployment speed, liquid-cooling reliability, rack-level standardisation, energy and water performance, global service capability and alignment with semiconductor and server ecosystems.

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

This Insight Report provides a comprehensive analysis of the global Sustainable AI Data Center Infrastructure landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Sustainable AI Data Center Infrastructure portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Sustainable AI Data Center Infrastructure market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Sustainable AI Data Center Infrastructure and breaks down the forecast by Infrastructure Function, 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 Sustainable AI Data Center Infrastructure.

This report presents a comprehensive overview, market shares, and growth opportunities of Sustainable AI Data Center Infrastructure market by product type, application, key players and key regions and countries.

Segmentation by Infrastructure Function:

Thermal Management Infrastructure

Power and Electrical Infrastructure

Modular Facility Infrastructure

Sustainability and Operations Software

On-site Energy and Resilience Systems

Segmentation by Cooling Technology:

Advanced Air and Hybrid Cooling

Direct-to-Chip Liquid Cooling

Immersion Cooling

Two-phase / Waterless Liquid Cooling

Other

Segmentation by Power Architecture:

Conventional AC UPS and Distribution

High-voltage DC / Advanced DC Distribution

Medium-voltage and Grid-interface Systems

On-site Power and Microgrid Systems

Other

Segmentation by Sustainability Value Lever:

Energy Efficiency Improvement

Water Efficiency and Waterless Operation

Carbon Reduction and Clean Power Integration

Deployment Efficiency and Resource Optimization

Other

Segmentation by Application:

Hyperscale AI Training Facilities

AI Inference and Cloud Service Data Centers

Colocation AI Hosting Facilities

Enterprise and Sovereign AI Facilities

Edge and Specialized AI Facilities

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 analyzing the company's coverage, product portfolio, its market penetration.

Schneider Electric SE

Vertiv Holdings Co

Eaton Corporation plc

ABB Ltd

Delta Electronics, Inc.

Huawei Digital Power

Johnson Controls

Trane Technologies

Legrand SA

Rittal

nVent Electric

STULZ GmbH

Munters Group AB

Daikin Industries

Carrier Global

Envicool

Shenling

CoolIT Systems

Motivair

Submer

LiquidStack

Asetek

Nidec Corporation

LG Electronics

Mitsubishi Electric

Hon Hai Precision Industry

Lenovo Group

HPE

Supermicro

Quanta

Wiwynn

Kaori

Alfa Laval

Kelvion

Bloom Energy

Cummins

Caterpillar

Kstar

Kehua Data

Goaland

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