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Data Center Heat Exchangers Market by Type (Air-to-Air, Liquid-to-Liquid, Liquid-to-Air, Refrigerant-Based), Cooling Technology, Application, Data Center Type (Hyperscale, Colocation, Enterprise, Edge & Micro), and Region - Global Forecast to 2032

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Abstracts

The data center heat exchangers market is projected to grow from USD 7.67 billion in 2026 to USD 14.40 billion by 2032, at a CAGR of 11.1% over the forecast period. The market comprises technologies and solutions that transfer and dissipate heat generated by servers, storage systems, networking equipment, and high-performance computing infrastructure within data centers. Heat exchangers are a critical component of modern cooling architectures, enabling efficient heat transfer between coolant loops, chilled water systems, and ambient cooling environments, thereby maintaining optimal operating temperatures and ensuring reliable IT performance. The market is growing rapidly due to the expansion of artificial intelligence (AI), machine learning, cloud computing, and hyperscale data centers, which are driving higher rack power densities and increasing thermal management requirements.

“By type, the liquid-to-liquid heat exchangers segment will be the largest in value within the data center heat exchangers market during the forecast period.”

The liquid-to-liquid heat exchangers segment is expected to account for the largest share of the data center heat exchangers market by value during the forecast period, driven by the accelerating adoption of liquid cooling technologies in hyperscale, artificial intelligence (AI), and high-performance computing (HPC) data centers. Liquid-to-liquid heat exchangers play a pivotal role in transferring heat from server-side coolant loops to

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facility water systems while maintaining complete fluid separation, ensuring efficient thermal management, system reliability, and equipment protection. As data centers increasingly deploy high-density GPU clusters and AI accelerators that generate substantial thermal loads, these heat exchangers have become a core component of cooling distribution units (CDUs), direct-to-chip cooling systems, and other advanced liquid cooling architectures.

The segment's value leadership is supported by its ability to deliver superior heat transfer efficiency, scalability, and operational performance compared with conventional cooling approaches. Liquid-to-liquid heat exchangers enable data center operators to manage rising rack power densities, improve cooling effectiveness, and reduce overall energy consumption, making them essential for next-generation computing environments. Additionally, the growing focus on sustainability and energy optimization is driving demand for warm-water cooling and heat recovery applications, where liquid-to-liquid heat exchangers play a critical role in efficient thermal energy transfer and reuse. Their widespread deployment across hyperscale facilities, AI factories, colocation centers, and enterprise data centers, combined with increasing investments in liquid cooling infrastructure, is expected to sustain strong revenue generation and position the liquid-to-liquid heat exchangers segment as the largest contributor to the data center heat exchangers market throughout the forecast period.

"By cooling technology, the direct-to-chip cooling will be the fastest-growing segment of the data center heat exchangers market during the forecast period."

The direct-to-chip (D2C) cooling segment is expected to be the fastest-growing segment of the data center heat exchangers market over the forecast period, driven by the rapid rise of artificial intelligence (AI), machine learning, and high-performance computing (HPC) workloads that generate unprecedented heat densities in modern data centers. Direct-to-chip cooling technology removes heat directly from high-power components, such as CPUs, GPUs, and AI accelerators, using liquid-cooled cold plates, significantly improving thermal management efficiency compared with conventional air-cooling systems. As rack power densities continue to rise beyond 100 kW and approach 200 kW or more in advanced AI deployments, D2C cooling is becoming the preferred solution for maintaining optimal operating temperatures and ensuring reliable system performance.

The growth of this segment is closely tied to the growing deployment of liquid-cooling

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infrastructure, where heat exchangers play a critical role in transferring heat from server coolant loops to facility cooling systems. Liquid-to-liquid heat exchangers integrated into cooling distribution units (CDUs) are essential for efficient heat rejection and for supporting the continuous operation of D2C cooling architectures. The technology also offers substantial benefits, including improved cooling efficiency, reduced energy consumption, lower Power Usage Effectiveness (PUE), and support for higher rack density, making it highly attractive for hyperscale operators, cloud service providers, colocation facilities, and enterprise data centers.

“By application, the server & IT hardware cooling segment will be the fastest in the data center heat exchangers market during the forecast period.”

The server & IT hardware cooling segment is expected to be the fastest-growing application segment of the data center heat exchangers market over the forecast period, driven by rising computational demands from artificial intelligence (AI), machine learning, cloud computing, and high-performance computing (HPC) workloads. Modern servers with high-performance CPUs, GPUs, and AI accelerators generate significantly more heat than traditional IT equipment, creating a growing need for advanced thermal management solutions. Heat exchangers play a critical role in maintaining optimal operating temperatures by efficiently removing heat from servers and other IT hardware, thereby ensuring reliable performance, preventing thermal throttling, and extending equipment lifespan.

The rapid adoption of liquid cooling technologies, including direct-to-chip and immersion cooling, is further accelerating demand for heat exchangers in server and hardware cooling applications. These cooling architectures rely on liquid-to-liquid and other advanced heat exchanger systems to dissipate heat from high-density computing equipment more effectively than conventional air-cooling methods. As data center operators continue to deploy AI clusters and increase rack power densities, the importance of efficient server cooling solutions is becoming increasingly critical.

“The data center heat exchangers market in North America will be the largest, in terms of value, during the forecast period.”

North America is expected to account for the largest share of the global data center heat exchangers market by value during the forecast period, driven by the region's

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leadership in hyperscale data center deployments, artificial intelligence (AI) infrastructure investments, and adoption of advanced liquid cooling. The United States serves as a global hub for cloud computing and digital infrastructure, hosting numerous hyperscale facilities operated by major technology companies and cloud service providers. The rapid expansion of AI training clusters, generative AI workloads, and high-performance computing (HPC) environments is significantly increasing thermal management requirements, creating strong demand for high-value heat exchanger solutions that support liquid cooling architectures.

The region's dominance is further supported by early adoption of advanced cooling technologies, including direct-to-chip cooling, immersion cooling, and cooling distribution unit (CDU)-based systems, all of which rely heavily on liquid-to-liquid and other high-performance heat exchangers. As rack power densities continue to rise, data center operators across North America are investing in sophisticated thermal management infrastructure to maintain operational reliability, optimize cooling efficiency, and reduce energy consumption. These investments are driving increased spending on premium heat exchanger technologies, contributing to the region's leadership in market value.

Profile break-up of primary participants for the report:

By Company Type: Tier 1 – 45%, Tier 2 – 22%, and Tier 3 – 33%

By Designation: C-Level Executives– 50%, Directors– 10%, and Others – 40%

By Region: North America – 17%, Asia Pacific – 17%, Europe – 33%, Middle East & Africa – 25%, and South America – 8%

Leading players in the data center heat exchangers market include Vertiv Holdings Corp. (US), Schneider Electric (France), Alfa Laval (Sweden), Rittal GmbH & Co. KG (Germany), STULZ GmbH (Germany), Airedale International Air Conditioning Ltd. (UK), CoollT Systems Inc. (Canada), Munters Group AB (Sweden), Modine Manufacturing Company (US), Danfoss A/S (Denmark), Kelvion Holding GmbH (Germany), Nortek Air Solutions LLC (US), Eaton Corporation plc (Ireland), Johnson Controls International plc (Ireland), Huawei Technologies Co., Ltd. (China), Vikrant Heat Exchangers Pvt. Ltd. (India), thermowave (Germany), and others. These key players are significant contributors to the data center heat exchangers market. They have adopted various strategies, including agreements, joint ventures, and expansions, to increase their

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market share and revenue.

Research Coverage

The report defines segments and projects the size of the data center heat exchangers market by type, cooling technology, data center type, application, and region. It strategically profiles key players and comprehensively analyzes their market share and core competencies. It also tracks and analyzes competitive developments, such as expansions, partnerships, and acquisitions undertaken by these players in the market.

Reasons to Buy the Report

The report is expected to help market leaders and new entrants by providing the closest approximations of revenue figures for the data center heat exchangers market and its segments. It is also expected to help stakeholders gain a deeper understanding of the market's competitive landscape, acquire valuable insights to enhance their business positions, and develop effective go-to-market strategies. It also enables stakeholders to understand the market's pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights into the following pointers

Analysis of drivers (rapid growth of AI and high-performance computing, accelerating adoption of liquid cooling, expansion of hyperscale and colocation data centers), restraints (high initial capital investment, complex retrofit requirements), opportunities (AI-optimized data centers, heat recovery and reuse systems, development of advanced heat exchanger technologies), and challenges (managing increasing rack power densities, balancing performance and energy consumption) are influencing the growth of the data center heat exchangers market

Product Development/Innovation: Detailed insights into upcoming technologies, research & development activities in the data center heat exchangers market

Market Development: Comprehensive information about lucrative markets – the report analyzes the data center heat exchangers market across varied regions

Market Diversification: Exhaustive information about new products, various types, untapped geographies, recent developments, and investments in the market

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Competitive Assessment: In-depth assessment of market share, growth strategies, and product offerings of leading players such as Vertiv Holdings Corp. (US), Schneider Electric (France), Alfa Laval (Sweden), Rittal GmbH & Co. KG (Germany), STULZ GmbH (Germany), Airedale International Air Conditioning Ltd. (UK), CoollT Systems Inc. (Canada), Munters Group AB (Sweden), Modine Manufacturing Company (US), Danfoss A/S (Denmark), Kelvion Holding GmbH (Germany), Nortek Air Solutions LLC (US), Eaton Corporation plc (Ireland), Johnson Controls International plc (Ireland), Huawei Technologies Co., Ltd. (China), Vikrant Heat Exchangers Pvt. Ltd. (India), thermowave (Germany), and others are the key players in data center heat exchangers market

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