

Data Center Liquid Cooling Manifolds Market by Type (In-rack, RoW-based, Facility-level), Cooling Technology Type (Immersion, Direct to Chip, Hybrid), Data Center Type, Material Type, Design Type, Installation Type, and Region - Global Forecast to 2033

<https://marketpublishers.com/r/DC072F0B7BCCEN.html>

Date: June 2026

Pages: 261

Price: US\$ 4,950.00 (Single User License)

ID: DC072F0B7BCCEN

Abstracts

The data center liquid-cooling manifolds market is projected to grow from USD 0.94 billion in 2026 to USD 6.33 billion by 2033, at a CAGR of 31.2%. The global data center liquid-cooling manifolds market is expanding primarily due to the rapid expansion of artificial intelligence (AI), machine learning (ML), and high-performance computing (HPC) workloads that require advanced thermal management solutions. Increasing rack power densities are making traditional air-cooling systems less effective, accelerating the adoption of liquid-cooling architectures. Growing deployment of direct-to-chip and immersion cooling technologies is creating strong demand for manifolds that ensure efficient coolant distribution. Hyperscale and colocation data center operators are investing heavily in high-density infrastructure to support AI-driven applications. Rising emphasis on energy efficiency and lower operating costs is further encouraging the transition to liquid-cooling systems. Sustainability initiatives and carbon reduction targets are also driving the adoption of more efficient cooling technologies. Continuous growth in cloud computing, digital services, and data generation is expanding the need for advanced cooling infrastructure. As a result, manifolds are becoming critical components in next-generation data center cooling ecosystems.

“By manifold type, the in-rack manifolds segment is estimated to hold the largest market share throughout the forecast period.”

The in-rack manifolds segment is growing rapidly in the global data center liquid-cooling manifolds market due to increasing deployment of high-density AI and GPU servers that require precise coolant distribution at the rack level. These manifolds enable efficient flow balancing between multiple cold plates and compute nodes, improving thermal performance and system reliability. Their compact design supports direct-to-chip cooling architectures, which are becoming the preferred solution for next-generation data centers. In-rack manifolds also simplify installation, maintenance, and scalability compared with centralized distribution systems. Growing adoption of modular data center designs is further accelerating demand for rack-integrated cooling infrastructure. Hyperscale operators favor in-rack manifolds because they provide flexibility for future capacity expansion. The shift toward higher rack power densities is increasing the need for localized coolant management. As a result, in-rack manifolds are becoming a critical component of advanced liquid-cooling deployments.

“By cooling technology type, the direct-to-chip cooling segment is estimated to hold the largest market share throughout the forecast period.”

The market for direct-to-chip cooling technology is growing rapidly in the global data center liquid-cooling manifolds market due to its ability to efficiently cool high-power CPUs and GPUs used in AI, machine learning, and HPC applications. Technology removes heat directly from critical components, delivering superior thermal performance compared to conventional air cooling solutions. Its compatibility with both new and existing data center environments makes deployment easier and more cost-effective. Growing adoption of high-density server racks is increasing the need for precise coolant distribution, driving demand for manifold systems. Direct-to-chip cooling also supports lower energy consumption and improved data center efficiency. Major technology companies and server OEMs are increasingly standardizing this approach for next-generation AI infrastructure. The technology enables higher computing density without compromising reliability or performance. As a result, direct-to-chip cooling is becoming the preferred liquid-cooling architecture across hyperscale and enterprise data centers.

“By data center type, the hyperscale data center segment is estimated to hold the largest market share throughout the forecast period.”

The hyperscale data center segment is expected to hold the largest market share during the forecast period due to the rapid expansion of cloud computing, artificial intelligence, and large-scale digital services. Major technology companies are continuously investing in hyperscale facilities to support massive data processing and storage requirements. These data centers operate with extremely high IT loads and rack densities, which

significantly increase the demand for advanced cooling infrastructure. As a result, hyperscale facilities require large-scale deployment of liquid-cooling technologies to maintain efficient thermal management. Additionally, hyperscale operators typically build multiple large campuses across different regions, further increasing infrastructure investments. Therefore, the growing number of hyperscale data center deployments globally is expected to drive the largest share of the liquid-cooling market during the forecast period.

Profile break-up of primary participants for the report:

By Company Type: Tier 1 – 65%, Tier 2 – 20%, and Tier 3 – 15%

By Designation: C-Level Executives – 25%, Directors – 30%, and Others – 45%

By Region: North America – 30%, Asia Pacific – 40%, Europe – 20%, Middle East & Africa – 7%, and South America – 3%

CoolIT Systems (Ecolab) (Canada), Vertiv (US), Parker Hannifin (US), nVent Electric (UK), and GF Industry & Infrastructure (Switzerland) are among the key players in the data center liquid-cooling manifolds market. These players have adopted various strategies, including agreements, joint ventures, and expansions, to increase their market share and business revenue.

Research Coverage:

The report defines segments and projects the size of the data center liquid-cooling manifolds market based on manifold types, cooling technology types, data center types, material types, design types, installation types, and region. It strategically profiles the key players and comprehensively analyzes their market share and core competencies. It also tracks and analyzes competitive developments, such as expansions, agreements, and acquisitions undertaken by them in the market.

Reasons to Buy the Report:

The report is expected to help the market leaders/new entrants by providing them with the closest approximations of revenue numbers of the data center liquid-cooling manifolds market and its segments. This report 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 critical drivers (rapid expansion of hyperscale or colocation data centers, increasing deployment of high-density server racks, rising demand for energy-efficient and sustainable cooling solutions, growing adoption of direct-to-chip liquid-cooling architectures), restraints (high initial capital investment and deployment costs, concerns regarding coolant leakage, system reliability, and maintenance complexity), opportunities (expansion of AI-ready data centers and high-density rack-scale infrastructure, increasing adoption of row-based manifold systems in liquid-cooled data center environments), and challenges (lack of industry-wide standardization and interoperability across cooling infrastructures) influencing the growth of the Data center liquid-cooling manifolds market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities in the data center liquid-cooling manifolds market

Market Development: Comprehensive information about lucrative markets by analyzing the data center liquid-cooling manifolds market across varied regions

Market Diversification: Exhaustive information about new products, various types, untapped geographies, recent developments, and investments in the data center liquid-cooling manifolds market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players such as CoolIT Systems (Ecolab) (Canada), Vertiv (US), Parker Hannifin (US), nVent Electric (UK), and GF Industry & Infrastructure (Switzerland), among others, are the key players in the data center liquid-cooling manifolds market.

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