

Data Center Liquid Cooling Market Size and Forecast (2021 - 2031), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Cooling Type (Room Based Cooling, Row Based Cooling, and Rack Based Cooling), Data Center Type (Hyperscale Data Center, Colocation Data Center, Wholesale Data Center, and Enterprise Data Center), Industry Vertical (IT and Telecom, BFSI, Healthcare, Manufacturing, Government and Defense, Media and Entertainment, Retail, Energy, and Others), and Geography (North America, Europe, Asia Pacific, Middle East and Africa, and South and Central America)

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Abstracts

The data center liquid cooling market size was valued at US\$ 4.24 billion in 2024 and is expected to reach US\$22.08 billion by 2031; it is estimated to record a CAGR of 26.7% from 2025 to 2031.

The data center liquid cooling market is segmented into five major regions—North America, Europe, Asia Pacific (APAC), the Middle East & Africa (MEA), and South & Central America. North America dominated the market in 2023, followed by APAC and Europe, respectively. In North America, the data center liquid cooling market is experiencing accelerated growth, driven by the exponential demand from artificial intelligence (AI) clusters, high-performance computing (HPC), and cryptocurrency

mining operations. These workloads generate unprecedented heat densities, making traditional air-cooling methods inefficient and cost-prohibitive. Moreover, regulatory pressure and corporate sustainability goals are pushing hyperscale operators and colocation providers to adopt liquid cooling for its superior energy efficiency and potential for waste heat reuse. In March 2024, NVIDIA announced the launch of its next-generation AI data center reference architecture, developed in partnership with leading North American colocation providers. This architecture mandates the use of direct-to-chip liquid cooling for all GPU racks exceeding 40kW, establishing a new industry standard for high-density deployment in the region. This development highlights North America's role as the primary testing ground and early adopter of cutting-edge liquid cooling technologies.

In February 2024, a consortium comprising Google, Microsoft, and several chip manufacturers formed the “Advanced Cooling Consortium” (ACC) headquartered in Silicon Valley. The ACC aims to standardize interfaces and accelerate the commercial deployment of immersion cooling systems across North American data centers. Their first initiative involves creating open specifications for dielectric fluid compatibility and rack-level immersion tank designs, aiming to reduce vendor lock-in and deployment timelines. Such collaborative industry efforts underscore the strategic importance of liquid cooling in sustaining North America's digital infrastructure growth while managing its environmental footprint.

The Asia Pacific data center liquid cooling market is projected to experience the highest growth rate from 2025 to 2031. This surge is fueled by massive investments in AI infrastructure, national supercomputing initiatives, and the rapid expansion of hyperscale data centers by both global and local cloud providers. Countries like China, Japan, and Singapore are implementing national strategies to lead in AI, which directly translates into demand for high-efficiency cooling. Government policies promoting green data centers with strict Power Usage Effectiveness (PUE) mandates are also accelerating the shift from air to liquid cooling. For instance, in January 2024, the Chinese government released updated guidelines for its national computing power network, explicitly endorsing liquid cooling as the preferred solution for new mega-data center projects with IT loads above 10MW. This top-down directive is expected to catalyze the liquid cooling supply chain and deployment across the APAC region at an unprecedented scale.

Asetek, Inc, Rittal GmbH & Co KG, Stulz SpA, Carrier Global Corp, Daikin Industries Ltd, Delta Electronics Inc, Fujitsu Ltd, Mitsubishi Corp, Schneider Electric SE, and Vertiv Group Corp. are among the key data center liquid cooling market players that are

profiled in this market study.

The overall data center liquid cooling market size has been derived using both primary and secondary sources. Exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the data center liquid cooling market size. The process also helps obtain an overview and forecast of the market with respect to all the market segments. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain analytical insights. This process includes industry experts such as VPs, business development managers, market intelligence managers, and national sales managers, along with external consultants such as valuation experts, research analysts, and key opinion leaders, specializing in the data center liquid cooling market.

Reason to buy

Saves and reduces time required for identifying the market growth, size, leading players, and segments in the global Data Center Liquid Cooling market.

Highlights key business priorities to assist companies in realigning their business strategies

Emphasizes key findings and recommendations that uncover emerging industry trends in the global Data Center Liquid Cooling market, enabling stakeholders across the value chain to craft effective long-term strategies

Develop/modify business expansion plans by analyzing substantial growth prospects in mature and emerging markets

Scrutinizes in-depth global Data Center Liquid Cooling market trends, along with factors driving the market, as well as those hindering it

Enhances the decision-making process by understanding the strategies that underpin commercial interest with respect to client products, segmentation, pricing, and distribution

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