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Immersion Cooling Fluids Market for EVs - A Global and Regional Analysis: Focus on Product, Application, and Country Analysis - Analysis and Forecast, 2026-2035

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Abstracts

Immersion cooling places battery cells or other high-voltage components in direct contact with an electrically non-conductive fluid. Unlike conventional cold-plate systems, heat is transferred directly from cell surfaces, tabs, motors, or power-electronic components into the dielectric medium. The technology is becoming more relevant as electric vehicles adopt higher-energy-density packs, faster charging, more integrated cell-to-pack architectures, and compact high-voltage systems. Direct-contact cooling can improve temperature uniformity and reduce thermal gradients, supporting battery life, charging performance, and thermal-runaway management. The report distinguishes single-phase fluids, which remain liquid during operation, from two-phase fluids that use controlled boiling and condensation. It also evaluates mineral oils and synthetic oils and esters. Adoption requires validation of electrical properties, viscosity, flash and fire point, oxidation stability, elastomer and polymer compatibility, long-term aging, maintenance, and recovery. Technology commercialization therefore depends on integrated fluid-and-pack engineering rather than fluid selection alone.

Global Immersion Cooling Fluids Market for EVs Market Industry Overview

The industry is at an early commercialization stage but is positioned for rapid expansion as electric-vehicle thermal requirements intensify. The report also presents optimistic and pessimistic scenarios, reflecting uncertainty around OEM qualification, platform launch timing, chemistry choices, and production-scale validation. Demand is expected to develop first in technically demanding battery applications, premium and high-performance vehicles, commercial fleets, and platforms requiring repeated fast

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charging. The supply chain links base-oil and chemical producers, additive and formulation specialists, fluid suppliers, battery and pack developers, thermal-management integrators, OEMs, service organizations, and recyclers. Value increasingly shifts toward suppliers that can deliver validated systems, technical support, and lifecycle management.

Introduction of the Immersion Cooling Fluids Market for EVs Market

The global immersion cooling fluids market for EVs, valued at $5,164.9 Thousand in 2025, is projected to grow substantially, reaching $647,443.9 Thousand by 2035, with a compound annual growth rate (CAGR) of 54.49% from 2026 to 2035.

The market consists of dielectric fluids formulated for direct-contact thermal management of electric-vehicle batteries, motors, and power electronics. These fluids must remove heat while maintaining electrical insulation and compatibility with cells, busbars, connectors, seals, coatings, plastics, and other pack materials. Market development is being shaped by higher pack energy density, aggressive charging targets, thermal-propagation concerns, and the need to improve component reliability. The report treats the market as a specialized automotive-fluid opportunity rather than a conventional coolant segment because qualification cycles are longer, safety requirements are stricter, and fluid performance is tightly linked to vehicle architecture. Commercial adoption is therefore influenced by both fluid chemistry and the availability of validated immersion-cooled battery or component systems.

Market Introduction

Electric-vehicle platforms are becoming more power dense and thermally demanding. Higher charging rates generate concentrated heat, while cell-to-pack and cell-to-chassis designs reduce unused space and can make conventional cooling interfaces more difficult to optimize. Immersion cooling addresses these constraints by surrounding heat-generating components with dielectric fluid, enabling direct and relatively uniform heat transfer. For batteries, the approach can help control cell-to-cell temperature variation and support charging, durability, and safety objectives. For motors and power electronics, it can improve heat removal from compact assemblies. Commercial success nevertheless requires careful management of fluid quantity, pumping, filtration, sealing, service procedures, contamination control, and end-of-life recovery. The market is therefore developing through demonstrations, qualification programs, partnerships, and integrated fluid-and-hardware ecosystems rather than immediate broad replacement of existing glycol-based loops and cold plates.

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Global Immersion Cooling Fluids Market for EVs Market, by Region

Asia-Pacific accounted for 73.1% of the global market in 2025, followed by Europe at 16.9%, North America at 9.6%, and Rest-of-the-World at 0.4%. Asia-Pacific benefits from the scale of battery-cell production, electric-vehicle manufacturing, fast-charging deployment, and high-voltage platform development, particularly in China and other major Asian automotive markets. Europe is supported by stringent battery-safety expectations, premium vehicle engineering, specialty chemical expertise, and active battery ecosystem investment. North America has strong fluid, additive, testing, and technology capabilities but faces cautious OEM qualification and cost scrutiny. Rest-of-the-World remains comparatively small, with opportunities linked to commercial vehicles, local assembly, fleet electrification, and deployment-focused partnerships.

Industrial Impact

Immersion cooling can alter battery-pack design, fluid procurement, maintenance, safety validation, and supplier relationships. Direct-contact fluids can reduce dependence on thermal interface materials and improve heat removal from irregular or densely packed surfaces, but they introduce new requirements for sealing, filtration, fluid handling, diagnostic procedures, and component compatibility. OEMs must consider the fluid as part of the electrical and safety architecture, not merely as a consumable. Battery manufacturers and pack integrators gain opportunities to differentiate through thermal performance and charging capability, while chemical and lubricant companies move closer to engineering decisions traditionally dominated by hardware suppliers. Service networks may require new procedures for draining, recovering, testing, and replacing fluids. Recycling and lifecycle management can also become important commercial differentiators.

Market Segmentation:

Segmentation 1: By Vehicle Type

- Passenger Cars
- Light Commercial Vehicles
- Heavy Commercial Vehicles

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Passenger cars represent the broadest long-term volume opportunity because they account for the largest share of global electric-vehicle production and include premium, performance, and mass-market platforms. Early adoption is likely to concentrate in vehicles where fast charging, compact battery packaging, high power output, or thermal safety justify the added system complexity. Light commercial vehicles offer a compelling use case because uptime, repeated charging, route intensity, and lifecycle economics can support investment in advanced cooling. Heavy commercial vehicles may require particularly robust thermal management due to large battery packs, sustained loads, high energy throughput, and demanding duty cycles. Across all vehicle types, adoption depends on validated durability, serviceability, fluid stability, and total cost of ownership.

Segmentation 2: By Propulsion Type

BEV

Hybrid Vehicles

Battery electric vehicles are the primary propulsion segment because their large traction batteries, high charging power, and reliance on thermal performance create the strongest need for direct-contact cooling. BEV platforms can use immersion fluids in batteries, motors, and power electronics, giving suppliers multiple points of entry. Hybrid vehicles have smaller batteries and different duty profiles, but high-power hybrid systems can still benefit from compact thermal solutions in motors and electronics. The market opportunity in hybrids is likely to remain more selective and application specific. The source report indicates that supplier priorities should focus on BEV qualification, fast-charging performance, safety validation, and compatibility with next-generation integrated pack designs.

Segmentation 3: By Application

EV Batteries

EV Motors

Power Electronics

EV batteries are expected to anchor market demand because temperature uniformity,

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thermal-runaway mitigation, charging speed, degradation, and safety directly influence vehicle performance and ownership economics. EV motors form a second application area, particularly where compact high-output designs create localized heat and conventional jackets are insufficient. Power electronics, including inverters and other high-voltage components, also benefit from dielectric cooling because the fluid can contact electrically active assemblies while removing heat. Application-specific formulation is important: battery fluids require broad material compatibility and long aging stability, whereas motors and electronics may emphasize viscosity, heat transfer, oxidation resistance, and electrical properties under different operating conditions.

Segmentation 4: By Product Type

Single-Phase Dielectric Immersion Fluid

Two-Phase Dielectric Immersion Fluid

Single-phase dielectric immersion fluids are expected to remain the main adoption pathway because they stay liquid during operation, simplify containment and pressure management, and are compatible with a wider range of system architectures. They can be circulated through heat exchangers and offer a more familiar engineering route for automotive qualification. Two-phase fluids use evaporation and condensation to absorb and reject heat, offering high heat-flux capability but requiring tighter control of boiling behavior, vapor management, sealing, and fluid losses. Two-phase approaches may gain importance in extremely thermally intensive applications, but regulatory and environmental scrutiny of some fluorinated chemistries affects supplier strategies. The market therefore favors formulations that balance thermal performance with safety, sustainability, and long-term availability.

Segmentation 5: By Chemistry

Mineral Oils

Synthetic Oils and Esters

The chemistry segmentation comprises mineral oils and synthetic oils and esters. Mineral oils can offer established supply, relatively attractive economics, and useful dielectric properties, but automotive adoption requires careful control of viscosity,

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oxidation, purity, and material compatibility. Synthetic oils and esters are gaining relevance because formulators can tailor thermal behavior, low-temperature performance, oxidation stability, fire characteristics, biodegradability, and compatibility. Ester-based products are receiving attention as OEMs and suppliers reassess environmental profile and long-term safety. Shell's acquisition of MIDEL and MIVOLT illustrates the strategic value placed on ester-based immersion-fluid capabilities. Chemistry selection ultimately depends on vehicle architecture, safety targets, service life, environmental requirements, and qualification evidence.

Segmentation 6: by Region

North America: U.S., Canada, and Mexico

Europe: Germany, France, Italy, Spain, U.K., and Rest-of-Europe

Asia-Pacific: China, Japan, South Korea, India, Australia, and Rest-of-Asia-Pacific

Rest-of-the-World: South America, Middle East and Africa

Regional adoption is shaped by electric-vehicle production, battery manufacturing, charging infrastructure, safety regulation, supplier ecosystems, and OEM engineering priorities. Asia-Pacific leads through manufacturing scale and rapid platform development. Europe combines premium vehicle programs, battery investment, stringent safety expectations, and specialty-fluid expertise. North America offers strong chemical, lubricant, testing, and technology capabilities, with opportunities in domestic battery projects, commercial fleets, and high-performance vehicles. Rest-of-the-World is developing from a smaller base and will depend on practical partnerships with local assemblers, fleet operators, bus and truck manufacturers, and pack integrators. Suppliers must therefore align regional technical support and qualification resources with local vehicle and battery ecosystems.

Asia-Pacific is expected to remain the dominant region. Its position reflects China's large electric-vehicle and battery manufacturing base, the presence of leading cell suppliers, rapid introduction of fast-charging platforms, and strong regional activity in high-voltage systems. Japan, South Korea, India, and Australia add distinct opportunities in advanced materials, vehicle engineering, battery production, commercial mobility, and technology demonstration. Regional leadership does not

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guarantee uniform adoption, because OEMs still require platform-specific evidence on fluid compatibility, safety, durability, and service. Nevertheless, the concentration of battery investment and vehicle production gives Asia-Pacific the strongest environment for scaling immersion-cooled systems from prototypes into commercial programs.

Recent Developments in the Immersion Cooling Fluids Market for EVs Market

In September 2025, Shell and RML Group demonstrated a compact 34-kWh battery pack using Shell EV-Plus Thermal Fluid, enabling 10%-to-80% charging in under ten minutes while improving temperature uniformity, thermal safety, and pack-design simplicity.

In August 2025, TotalEnergies and XING Mobility formed a partnership combining advanced dielectric fluids with immersion-cooled battery architecture, supporting pre-qualified cooling ecosystems for electric mobility, marine applications, energy storage, mining equipment, aviation, and data centers.

In January 2024, Shell completed its acquisition of MIDEL and MIVOLT, adding synthetic and natural ester-based fluids, including dielectric immersion-cooling formulations supporting thermally efficient electric-vehicle batteries, energy-storage systems, data centers, and electrified transportation applications.

Demand — Drivers, Challenges, and Opportunities

Market Drivers

The primary driver is the need for cell-level temperature uniformity as battery packs become more energy dense and charging rates increase. Direct-contact dielectric fluids can remove heat from a larger portion of the cell surface than conventional cold plates and can reduce thermal gradients that accelerate degradation or constrain charging. Commercial electric vehicles add another driver because intensive duty cycles, large energy throughput, and uptime requirements increase the value of durable thermal management. Fast-charging demonstrations improve commercial visibility by showing that immersion systems can support compact packs and aggressive charging objectives. Battery safety and thermal-propagation requirements also move dielectric fluids into broader qualification discussions. Together, these factors encourage OEMs, cell manufacturers, and pack developers to evaluate immersion cooling as part of next-generation platform design.

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Market Challenges

The largest challenge is the redesign and qualification effort required to move from established cold-plate architectures to fluid-filled packs. OEMs must validate seals, plastics, elastomers, adhesives, coatings, electrical interfaces, cells, sensors, pumps, filters, and service procedures over the vehicle lifetime. Fluid cost is only one part of the economic equation; pack engineering, testing, manufacturing changes, maintenance, and recovery infrastructure can be more significant. Regulatory uncertainty around some chemistries and the planned exit of 3M from PFAS manufacturing add caution to chemistry selection. Serviceability is another concern because workshops need controlled draining, handling, contamination management, and replacement processes. These barriers lengthen commercialization cycles and can restrict early adoption to applications with strong performance or safety benefits.

Market Opportunities

A major opportunity is the development of EV-grade dielectric fluids specifically optimized for direct contact with cells and high-voltage components. Suppliers can earn premium positioning by combining heat transfer, electrical insulation, fire safety, low viscosity, oxidation stability, and long service life with validated compatibility data. A second opportunity lies in pre-qualified fluid-and-pack ecosystems. Partnerships between fluid companies, battery developers, and thermal-management specialists can reduce OEM testing burden and accelerate sourcing decisions. TotalEnergies' collaboration with XING Mobility and Shell's work with RML Group illustrate this model. Lifecycle services, including fluid monitoring, filtration, recovery, recycling, and technical support, can create recurring value. Regional opportunities also exist in commercial fleets and locally assembled electric buses and trucks, where uptime and practical deployment support are critical.

How Can This Report Add Value to an Organization?

The report helps organizations assess market timing, prioritize applications and regions, understand competing fluid chemistries, and identify partners across the value chain. It provides scenario-based forecasts, segmentation, regional analysis, competitive positioning, and technology context. Fluid suppliers can use it to guide formulation and qualification priorities; OEMs and battery developers can benchmark supplier capabilities and adoption barriers; investors can evaluate commercialization risk; and service or recycling companies can identify emerging lifecycle requirements. The report

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also supports strategic planning by connecting market growth with fast charging, battery safety, commercial duty cycles, regulation, and platform architecture.

Product/Innovation Strategy: Product strategy should center on application-specific EV-grade formulations rather than repurposed industrial dielectric fluids. Development programs should validate electrical insulation, viscosity across operating temperatures, heat-transfer performance, flash and fire behavior, oxidation stability, moisture tolerance, and compatibility with cells, seals, adhesives, plastics, coatings, and metals. Suppliers should create separate qualification packages for batteries, motors, and power electronics and should evaluate both new-fluid and aged-fluid performance. Innovation can also include fluid-health monitoring, filtration, recovery, and recyclable or lower-environmental-impact chemistries. Demonstration with representative packs and high-voltage components is essential for converting laboratory performance into automotive confidence.

Growth/Marketing Strategy: Growth strategy should focus on co-development with battery manufacturers, pack integrators, thermal-system suppliers, and vehicle OEMs. Technical demonstrations that quantify charging, temperature uniformity, safety, durability, and packaging benefits will be more persuasive than general product claims. Suppliers should prioritize Asia-Pacific for scale while maintaining engineering support in Europe and North America. Commercial-vehicle and fleet programs can provide early reference cases because uptime and repeated charging create visible economic value. Marketing should be supported by transparent test methods, compatibility databases, application engineering, and lifecycle-service plans. Partnerships with regional distributors, testing organizations, and recycling providers can reduce adoption friction and improve customer confidence.

Competitive Strategy: Competitive differentiation should combine fluid chemistry with qualification capability and system knowledge. Large lubricant and chemical companies can use global supply, automotive relationships, and technical-service networks, while specialists can compete through faster innovation, niche performance, and deeper immersion-cooling expertise. Strategic acquisitions can add ester or specialty-fluid technology, as shown by Shell’s MIDEL and MIVOLT transaction. Partnerships with battery architecture companies can create pre-qualified ecosystems and shorten OEM development cycles. Suppliers should protect intellectual property in formulation, additive systems, compatibility methods, and fluid management while avoiding dependence on chemistries facing uncertain regulation or supply. Long-term availability and consistent quality will be decisive in automotive sourcing.

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Methodology

Primary Data Sources

The primary sources include industry experts from the immersion cooling fluids market for EVs and various ecosystem stakeholders. Respondents, including CEOs, vice presidents, marketing directors, technology and innovation directors, product managers, thermal management specialists, battery-system engineers, and specialty chemical experts, have been interviewed to gather and verify both qualitative and quantitative aspects of this research study.

The key data points taken from primary sources include:

- Validation and triangulation of all the numbers and graphs
- Validation of report segmentations and key qualitative findings
- Understanding the competitive landscape
- Validation of the numbers of various markets for the market type
- Percentage split of individual markets for geographical analysis

Secondary Data Sources

This research study involves the usage of extensive secondary research, including directories, company websites, annual reports, investor presentations, product brochures, technical white papers, safety data sheets, product datasheets, patent publications, regulatory documents, automotive association data, EV production statistics, battery manufacturing announcements, thermal management literature, and specialty chemical industry resources. It also utilizes databases such as Hoover’s, Bloomberg, Businessweek, Factiva, Statista, patent databases, government statistical portals, and other commercial information platforms to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global immersion cooling fluids market for EVs.

In addition to the aforementioned data sources, the study has been undertaken with the help of information from organizations and industry bodies such as the International

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Energy Agency (IEA), International Organization of Motor Vehicle Manufacturers (OICA), European Automobile Manufacturers' Association (ACEA), China Association of Automobile Manufacturers (CAAM), Japan Automobile Manufacturers Association (JAMA), Korea Automobile and Mobility Association (KAMA), German Association of the Automotive Industry (VDA), Society of Motor Manufacturers and Traders (SMMT), U.S. Department of Energy (DOE), National Highway Traffic Safety Administration (NHTSA), United Nations Economic Commission for Europe (UNECE), International Organization for Standardization (ISO), International Electrotechnical Commission (IEC), SAE International, European Chemicals Agency (ECHA), and other EV, battery, dielectric fluid, specialty chemical, and thermal management-related sources.

Secondary research has been conducted to obtain crucial information about the industry's value chain, supply chain structure, fluid formulation ecosystem, chemistry mix, pricing assumptions, competitive landscape, total pool of key players, strategic initiatives, and current and potential applications. The study also evaluates the use of immersion cooling fluids across EV batteries, EV motors, and power electronics, along with adoption across passenger cars, light commercial vehicles, heavy commercial vehicles, BEVs, and hybrid vehicles.

The key data points taken from secondary research include:

- Segmentations and percentage shares
- Data for market value
- Key industry trends of the top players in the market
- Qualitative insights into various aspects of the market, key trends, and emerging areas of innovation
- Quantitative data for mathematical and statistical calculations

Factors for Data Prediction and Modeling

The section exhibits the standard assumptions and limitations followed throughout the research study, named the immersion cooling fluids market for EVs.

- The scope of this report focuses on dielectric immersion cooling fluids used in

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electric vehicles, including single-phase dielectric immersion fluids and two-phase dielectric immersion fluids used for EV batteries, EV motors, and power electronics. The study covers mineral oils, synthetic oils, and esters used in vehicle-level immersion cooling applications across passenger cars, light commercial vehicles, and heavy commercial vehicles, as well as BEV and hybrid vehicle platforms. The market estimation includes immersion cooling fluid revenue directly attributable to EV thermal management applications, including fluids used in pilot programs, prototype platforms, pre-commercial validation, and commercial EV deployments. It excludes conventional automotive coolants, glycol-water coolants, refrigerants, lubricants, engine oils, transmission fluids, and immersion cooling fluids used in data centers, stationary energy storage systems, transformers, industrial equipment, and other non-EV applications.

The base currency considered for the market analysis is US$. Currencies other than the US$ have been converted to the US$ for all statistical calculations, considering the average conversion rate for that particular year.

The currency conversion rate has been taken from the historical exchange rate on the Oanda website.

Nearly all recent developments from January 2022 to April 2026 have been considered in this research study.

The information rendered in the report is a result of in-depth primary interviews, surveys, and secondary analysis.

Where relevant information was not available, proxy indicators and extrapolation were employed.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

Technologies currently used are expected to persist through the forecast with no major breakthroughs in technology.

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