

Global Anhydrous Two-Phase Liquid Cooling System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Anhydrous Two-Phase Liquid Cooling System market size is expected to reach \$ 2900 million by 2032, rising at a market growth of 24.4% CAGR during the forecast period (2026-2032).

Anhydrous two-phase liquid cooling systems are high-density thermal management systems used for data centers, HPC, and AI servers. The IT-side loop does not use water or water-glycol, but instead uses insulating refrigerants or low-boiling dielectric fluids that absorb heat and vaporize in cold plates, immersion tanks, or rack heat exchangers, then release heat in condensers and return to liquid form to achieve liquid-vapor phase-change heat transfer. Such systems typically include two-phase cold plates or immersion tanks, pumps or passive return structures, condensers, distribution units, monitoring controls, and safety valves. They are suitable for high-power CPUs/GPUs, ASICs, and high-heat-flux electronic equipment. The product's gross margin is approximately 38%.

Anhydrous two-phase liquid cooling systems are a high-end niche within data center liquid cooling. The core feature is that the IT-side cooling loop does not use water or water-glycol, but uses insulating refrigerants or low-boiling dielectric fluids to achieve efficient phase-change heat transfer through liquid heat absorption and vaporization, followed by vapor condensation and return. This category mainly covers two-phase direct-to-chip cooling, two-phase immersion cooling, and dielectric refrigerant circulation racks/modules, and is suitable for AI servers, GPU clusters, HPC, supercomputing centers, and high-density colocation data centers.

From the demand side, the continuous rise in AI training and inference server power is putting increasing pressure on traditional air cooling and ordinary single-phase water

cooling in terms of high heat flux, rack power density, leakage risk, and water consumption. The value of anhydrous two-phase liquid cooling lies in using latent heat of phase change to increase heat removal capacity per unit flow, while reducing the risk of water entering server areas. It is especially suitable for data centers with rapidly rising rack power, limited water resources, or high operational safety requirements. In the short term, the market is still mainly focused on new AI data centers, supercomputing projects, and demonstration-type high-density racks. Procurement decisions place greater emphasis on system reliability, fluid safety, maintenance standards, and compatibility with server warranty systems.

From the supply side, the industry is still in the early stage of commercial scale-up, and technology routes have not yet fully converged. ZutaCore and Accelsius represent the two-phase direct-to-chip route, while LiquidStack, 2CRSi, Wiwynn, and others are more focused on two-phase immersion or full-system integration solutions. OptiCool, Eaton Boyd, ACT, and others cover refrigerant circulation, cold plates, and customized thermal management systems. Future competition will depend not only on cooling efficiency, but also on environmentally friendly dielectric fluid alternatives, system sealing and safety control, condenser heat exchange module integration, scaled delivery capability, and ecosystem binding with server manufacturers. Overall, this product has a smaller short-term market size than ordinary liquid cooling systems, but higher unit prices, technical barriers, and gross margins, making it a high-growth niche in high-density data center cooling upgrades.

This report studies the global Anhydrous Two-Phase Liquid Cooling System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Anhydrous Two-Phase Liquid Cooling System and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Anhydrous Two-Phase Liquid Cooling System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Anhydrous Two-Phase Liquid Cooling System total production and demand, 2021-2032, (Units)

Global Anhydrous Two-Phase Liquid Cooling System total production value, 2021-2032, (USD Million)

Global Anhydrous Two-Phase Liquid Cooling System production by region & country,

production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Anhydrous Two-Phase Liquid Cooling System consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Anhydrous Two-Phase Liquid Cooling System domestic production, consumption, key domestic manufacturers and share

Global Anhydrous Two-Phase Liquid Cooling System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Anhydrous Two-Phase Liquid Cooling System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Anhydrous Two-Phase Liquid Cooling System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Anhydrous Two-Phase Liquid Cooling System market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include ZutaCore, Accelsius, LiquidStack, OptiCool Technologies, Eaton Boyd Thermal, Advanced Cooling Technologies, 2CRSi, Wiwynn, GIGABYTE, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Anhydrous Two-Phase Liquid Cooling System market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Anhydrous Two-Phase Liquid Cooling System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Anhydrous Two-Phase Liquid Cooling System Market, Segmentation by Type:

Two-Phase Direct-To-Chip

Two-Phase Immersion

Two-Phase Rear-Door Or Enclosure

Hybrid Two-Phase Module

Global Anhydrous Two-Phase Liquid Cooling System Market, Segmentation by Heat Rejection Interface:

Air-Cooled Condenser

Facility Water Interface

Dry Cooler Interface

Direct Expansion Interface

Global Anhydrous Two-Phase Liquid Cooling System Market, Segmentation by Deployment Package:

Server Retrofit Kit

Integrated Rack System

Immersion Tank System

Containerized Module

Row or End-of-Row System

Global Anhydrous Two-Phase Liquid Cooling System Market, Segmentation by Rated Heat Capacity:

Up To 50 kW

50-250 kW

250 kW-1 MW

Above 1 MW

Global Anhydrous Two-Phase Liquid Cooling System Market, Segmentation by Application:

AI Training Data Centers

High-Performance Computing Clusters

Cloud and Colocation High-Density Racks

Edge and Micro Data Centers

Crypto and Blockchain Computing

Telecom and 5G Core Sites

Semiconductor and Electronics Test

Companies Profiled:

ZutaCore

Accelsius

LiquidStack

OptiCool Technologies

Eaton Boyd Thermal

Advanced Cooling Technologies

2CRSi

Wiwynn

GIGABYTE

Key Questions Answered:

1. How big is the global Anhydrous Two-Phase Liquid Cooling System market?
2. What is the demand of the global Anhydrous Two-Phase Liquid Cooling System market?
3. What is the year over year growth of the global Anhydrous Two-Phase Liquid Cooling System market?
4. What is the production and production value of the global Anhydrous Two-Phase Liquid Cooling System market?
5. Who are the key producers in the global Anhydrous Two-Phase Liquid Cooling System market?
6. What are the growth factors driving the market demand?

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