

Global Dielectric Coolants for Data Centers Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GE9AA1D6B2D8EN.html>

Date: August 2026

Pages: 181

Price: US\$ 4,480.00 (Single User License)

ID: GE9AA1D6B2D8EN

Abstracts

The global Dielectric Coolants for Data Centers market size is expected to reach \$ 1813 million by 2032, rising at a market growth of 4.6% CAGR during the forecast period (2026-2032).

Dielectric coolants for data centers are electrically insulating thermal management fluids designed for high-power servers, AI accelerators, high-performance computing clusters, and cloud computing infrastructure. Their core function is to rapidly transfer the high thermal loads generated by CPUs, GPUs, ASICs, power modules, memory, and entire server systems to heat exchange loops without causing electrical short circuits or corrosion risks, thereby addressing the limitations of traditional air cooling in rack power density, energy consumption, noise, space utilization, and hotspot control. These products are typically based on synthetic hydrocarbons, polyalphaolefins, synthetic esters, natural esters, silicone-based materials, or fluorinated fluids, and are differentiated through purification, additive design, viscosity control, flash point control, dielectric strength control, material compatibility validation, and long-term oxidation stability assessment. Typical applications include single-phase immersion cooling, two-phase immersion cooling, selected direct-to-chip liquid cooling, and server-level precision liquid cooling. Major customers include data center operators, cloud service providers, server manufacturers, liquid cooling system suppliers, AI computing centers, and cryptocurrency computing facilities.

The industrial value of dielectric coolants for data centers is expanding from a single thermal material into a core enabling component for high-density computing infrastructure. As AI training, inference services, high-performance computing, and cloud data processing impose higher power requirements on servers, traditional air-cooling systems are increasingly approaching their limits in heat exchange efficiency,

energy control, space utilization, and noise management. Dielectric coolants directly contact key heat-generating server components and transfer heat from the source to external heat exchange systems while maintaining electrical insulation and material compatibility. This enables data centers to operate at higher rack power densities. The technical evaluation of these products is no longer limited to thermal conductivity, but also includes viscosity, flash point, dielectric strength, oxidation stability, volatility, sealing material compatibility, and fluid condition changes after long-term operation. As liquid-cooled servers move from pilot deployment into scaled validation, dielectric coolants will become an important material affecting data center reliability, energy efficiency, and operating cost.

In terms of product structure, dielectric coolants for data centers are developing in parallel across single-phase immersion, two-phase immersion, direct-to-chip auxiliary fluids, and precision liquid cooling fluids. Single-phase immersion coolants emphasize system simplicity, low maintenance, high flash point, and material stability, making them suitable for tank immersion, rack-based immersion, and selected edge computing deployments. Two-phase immersion coolants use boiling and condensation cycles to achieve higher heat flux transfer, making them suitable for extremely high power density scenarios, but they impose higher requirements on sealed systems, fluid replenishment, environmental compliance, and fluid recovery. At the same time, bio-based esters, PFAS-free synthetic fluids, low-GWP fluorinated liquids, and highly stable PAO systems are becoming major directions for new product development. This reflects an industry shift from purely pursuing cooling efficiency toward a broader balance among safety, sustainability, compliance, and life-cycle cost. In the future, customers will rely more on system-level certification, server material compatibility data, and long-term operating validation when selecting coolants, rather than judging by a single physical property.

From the perspective of competition and regional structure, the supply of dielectric coolants for data centers is evolving from a market led by specialty chemical and lubricant companies in Europe and North America into one with growing participation from Japan, South Korea, China, and Southeast Asia. Traditional chemical companies have strengths in base fluid synthesis, purification, formulation, and global supply. Lubricant companies have advantages in thermal stability, oxidation control, and customer service systems, while fluorochemical companies have technical know-how in low-boiling-point, low-viscosity, and highly insulating fluids. The growth logic in Asia is becoming clearer because AI computing infrastructure, cloud service expansion, advanced manufacturing data centers, and local liquid cooling ecosystems are advancing at the same time. As large data centers place higher requirements on energy use, water consumption, carbon emissions, and operational reliability, coolant suppliers

will move from simply selling fluids toward providing formulation adaptation, system validation, operational monitoring, recovery and regeneration, and long-term services. Industry competition will shift from price competition to performance, certification, supply stability, and ecosystem integration.

This report studies the global Dielectric Coolants for Data Centers production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Dielectric Coolants for Data Centers 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 Dielectric Coolants for Data Centers that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Dielectric Coolants for Data Centers total production and demand, 2021-2032, (Tons)

Global Dielectric Coolants for Data Centers total production value, 2021-2032, (USD Million)

Global Dielectric Coolants for Data Centers production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Dielectric Coolants for Data Centers consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Dielectric Coolants for Data Centers domestic production, consumption, key domestic manufacturers and share

Global Dielectric Coolants for Data Centers production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Dielectric Coolants for Data Centers production by Phase Change Mechanism, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Dielectric Coolants for Data Centers production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Dielectric Coolants for Data Centers 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 3M Company, Engineered Fluids, Inc., The Chemours Company, Solstice Advanced Materials Inc., Dow Inc., Exxon Mobil Corporation, Shell plc, BP p.l.c., Chevron Phillips Chemical Company LLC, Cargill, Incorporated, 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 Dielectric Coolants for Data Centers market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Phase Change Mechanism, 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 Dielectric Coolants for Data Centers Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Dielectric Coolants for Data Centers Market, Segmentation by Phase Change Mechanism:

Single Phase

Two Phase

Global Dielectric Coolants for Data Centers Market, Segmentation by Base Material:

Mineral Oil Based

Polyalphaolefin Based

Synthetic Ester Based

Natural Ester Based

Silicone Based

Other

Global Dielectric Coolants for Data Centers Market, Segmentation by Environmental Attribute:

PFAS-Based

PFAS-Free Petrochemical-Based

Other

Global Dielectric Coolants for Data Centers Market, Segmentation by Application:

AI Training Data Centers

High-Performance Computing Clusters

Cloud Computing Data Centers

Other

Companies Profiled:

3M Company

Engineered Fluids, Inc.

The Chemours Company

Solstice Advanced Materials Inc.

Dow Inc.

Exxon Mobil Corporation

Shell plc

BP p.l.c.

Chevron Phillips Chemical Company LLC

Cargill, Incorporated

Perstorp AB

TotalEnergies SE

FUCHS SE

Valvoline Global Operations

Petroliam Nasional Berhad (PETRONAS)

Oleon NV

Daikin Industries, Ltd.

ENEOS Corporation

UBE Corporation

SK Enmove Co., Ltd.

GS Caltex Corporation

S-OIL Corporation

Quzhou Deyu Technology Co., Ltd.

Zhejiang Lihua New Materials Technology Co., Ltd.

Inventec Performance Chemicals

TCLAD Inc.

Key Questions Answered:

1. How big is the global Dielectric Coolants for Data Centers market?
2. What is the demand of the global Dielectric Coolants for Data Centers market?
3. What is the year over year growth of the global Dielectric Coolants for Data Centers market?
4. What is the production and production value of the global Dielectric Coolants for Data Centers market?
5. Who are the key producers in the global Dielectric Coolants for Data Centers market?
6. What are the growth factors driving the market demand?

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