

# Global Immersion Cooling Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Immersion Cooling market size is expected to reach \$ 1739 million by 2032, rising at a market growth of 18.8% CAGR during the forecast period (2026-2032).

Immersion Cooling is a data center thermal-management system in which servers, storage devices, network hardware, or dedicated computing modules are directly submerged in a dielectric fluid. Its core function is to remove heat from the complete IT assembly rather than only from selected processors, allowing higher rack density, reduced fan dependence, more stable component temperatures, and greater flexibility in heat rejection design.

In the current market, global supply is around 560,000 kW, with an average selling price of about 900 USD per kW EXW basis. The market includes immersion tanks, sealed chassis systems, integrated coolant distribution units, pumps, sensors, control hardware, internal heat exchangers, and system-level piping supplied as an identifiable cooling system. It excludes servers, stand-alone dielectric fluids, chillers, dry coolers, cooling towers, field installation, EPC work, financing, and long-term operational services. The supply chain begins with dielectric-fluid formulators, sheet-metal fabricators, tank and chassis suppliers, pumps, valves, heat exchangers, sensor suppliers, electrical-control vendors, and immersion-ready server manufacturers. System producers integrate these inputs into tank-based, chassis-based, single-phase, or two-phase platforms. Typical system gross margin is estimated at 35.0%, supported by barriers in thermal design, dielectric compatibility validation, leak prevention, production quality control, customer qualification, server warranty coordination, and large-scale deployment capability.

Demand is concentrated in hyperscale cloud facilities, AI training clusters, HPC centers,

cryptocurrency mining facilities, colocation data centers, enterprise compute rooms, edge sites, and government computing infrastructure. Procurement differs materially by customer class. Hyperscale customers generally use long qualification cycles, technical validation, supply-chain audits, framework agreements, and staged deployment releases. HPC and government users often procure through structured tenders, solution validation, acceptance testing, and project-based delivery. Mining users usually purchase standardized tank systems in larger batches and prioritize delivered capacity, electrical compatibility, lead time, and deployment speed. Enterprise and edge users more frequently require integrated packages with servers, racks, monitoring, CDU equipment, and on-site commissioning. North America remains important because of hyperscale AI investment and large cryptocurrency deployments. China is a major demand center for domestic AI infrastructure, supercomputing, telecommunications, and energy-efficient data centers. The Middle East has become strategically important because of sovereign AI programs, high-density cloud capacity, abundant power resources, and demand for water-efficient cooling designs. The Top 5 suppliers control approximately 37.0% of global revenue, indicating a fragmented market in which specialist immersion producers compete with global thermal-management groups and server infrastructure manufacturers.

From 2026 to 2032, market growth will be driven by AI accelerators, rising rack power density, GPU cluster expansion, sovereign computing programs, high-density colocation capacity, and increasing pressure to reduce cooling power and water consumption. The technical direction will favor higher-capacity single-phase systems for scalable commercial deployment, while two-phase systems retain a role in extreme-density HPC and specialized AI clusters. Average ASP is expected to decline gradually as tank fabrication, CDU integration, system control, and manufacturing scale improve, although high-redundancy AI and HPC systems will remain premium products. The main bottlenecks are dielectric-fluid qualification, hardware warranty coverage, server redesign, serviceability, fluid-management practices, facility-water integration, field commissioning capability, and the difficulty of retrofitting conventional air-cooled data halls. Environmental compliance will increasingly influence fluid selection, lifecycle management, and customer approval processes. The replacement cycle will remain linked to server-refresh cycles, typically encouraging immersion adoption when operators replace GPU clusters, storage nodes, mining hardware, or high-density compute platforms rather than during routine facility maintenance.

This report studies the global Immersion Cooling production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Immersion Cooling 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 Immersion Cooling that contribute to its increasing demand across many markets.

### Highlights and key features of the study

Global Immersion Cooling total production and demand, 2021-2032, (kW)  
Global Immersion Cooling total production value, 2021-2032, (USD Million)  
Global Immersion Cooling production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (kW), (based on production site)  
Global Immersion Cooling consumption by region & country, CAGR, 2021-2032 & (kW)  
U.S. VS China: Immersion Cooling domestic production, consumption, key domestic manufacturers and share  
Global Immersion Cooling production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (kW)  
Global Immersion Cooling production by Cooling Phase, production, value, CAGR, 2021-2032, (USD Million) & (kW)  
Global Immersion Cooling production by Application, production, value, CAGR, 2021-2032, (USD Million) & (kW)

This report profiles key players in the global Immersion Cooling 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 Submer, LiquidStack, Green Revolution Cooling, Midas Immersion Cooling, Vertiv, Baltimore Aircoil Company, GIGABYTE Technology, Wiwynn, Inventec, DCX Liquid Cooling Systems, 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 Immersion Cooling market

### Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (kW) and average price (US\$/kW) by

manufacturer, by Cooling Phase, 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 Immersion Cooling Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Immersion Cooling Market, Segmentation by Cooling Phase:

Single-Phase Immersion Cooling

Two-Phase Immersion Cooling

#### Global Immersion Cooling Market, Segmentation by Immersion Architecture:

Open-Bath Tank System

Enclosed-Chassis System

Hybrid Architecture System

## Global Immersion Cooling Market, Segmentation by System Capacity:

Less than 100 kW

100-200 kW

Greater than 200 kW

## Global Immersion Cooling Market, Segmentation by Application:

High Performance Computing

Artificial Intelligence

Edge Computing

Cryptocurrency Mining

Cloud Computing

Others

## Companies Profiled:

Submer

LiquidStack

Green Revolution Cooling

Midas Immersion Cooling

Vertiv

Baltimore Aircoil Company

GIGABYTE Technology

Wiwynn

Inventec

DCX Liquid Cooling Systems

Asperitas

Iceotope

LiquidCool Solutions

Sugon Data Infrastructure Innovation

ZTE

Zhejiang Mers Cooling Technology

BEEHE Technology

Haiwu Technology

Key Questions Answered:

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

## Contents

### 1 SUPPLY SUMMARY

- 1.1 Immersion Cooling Introduction
- 1.2 World Immersion Cooling Supply & Forecast
  - 1.2.1 World Immersion Cooling Production Value (2021 & 2025 & 2032)
  - 1.2.2 World Immersion Cooling Production (2021-2032)
  - 1.2.3 World Immersion Cooling Pricing Trends (2021-2032)
- 1.3 World Immersion Cooling Production by Region (Based on Production Site)
  - 1.3.1 World Immersion Cooling Production Value by Region (2021-2032)
  - 1.3.2 World Immersion Cooling Production by Region (2021-2032)
  - 1.3.3 World Immersion Cooling Average Price by Region (2021-2032)
  - 1.3.4 North America Immersion Cooling Production (2021-2032)
  - 1.3.5 Europe Immersion Cooling Production (2021-2032)
  - 1.3.6 China Immersion Cooling Production (2021-2032)
  - 1.3.7 China Taiwan Immersion Cooling Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
  - 1.4.1 Immersion Cooling Market Drivers
  - 1.4.2 Factors Affecting Demand
  - 1.4.3 Immersion Cooling Major Market Trends

### 2 DEMAND SUMMARY

- 2.1 World Immersion Cooling Demand (2021-2032)
- 2.2 World Immersion Cooling Consumption by Region
  - 2.2.1 World Immersion Cooling Consumption by Region (2021-2026)
  - 2.2.2 World Immersion Cooling Consumption Forecast by Region (2027-2032)
- 2.3 United States Immersion Cooling Consumption (2021-2032)
- 2.4 China Immersion Cooling Consumption (2021-2032)
- 2.5 Europe Immersion Cooling Consumption (2021-2032)
- 2.6 Japan Immersion Cooling Consumption (2021-2032)
- 2.7 South Korea Immersion Cooling Consumption (2021-2032)
- 2.8 ASEAN Immersion Cooling Consumption (2021-2032)
- 2.9 India Immersion Cooling Consumption (2021-2032)

### 3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Immersion Cooling Production Value by Manufacturer (2021-2026)

- 3.2 World Immersion Cooling Production by Manufacturer (2021-2026)
- 3.3 World Immersion Cooling Average Price by Manufacturer (2021-2026)
- 3.4 Immersion Cooling Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
  - 3.5.1 Global Immersion Cooling Industry Rank of Major Manufacturers
  - 3.5.2 Global Concentration Ratios (CR4) for Immersion Cooling in 2025
  - 3.5.3 Global Concentration Ratios (CR8) for Immersion Cooling in 2025
- 3.6 Immersion Cooling Market: Overall Company Footprint Analysis
  - 3.6.1 Immersion Cooling Market: Region Footprint
  - 3.6.2 Immersion Cooling Market: Company Product Type Footprint
  - 3.6.3 Immersion Cooling Market: Company Product Application Footprint
- 3.7 Competitive Environment
  - 3.7.1 Historical Structure of the Industry
  - 3.7.2 Barriers of Market Entry
  - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

## **4 UNITED STATES VS CHINA VS REST OF THE WORLD**

- 4.1 United States VS China: Immersion Cooling Production Value Comparison
  - 4.1.1 United States VS China: Immersion Cooling Production Value Comparison (2021 & 2025 & 2032)
  - 4.1.2 United States VS China: Immersion Cooling Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Immersion Cooling Production Comparison
  - 4.2.1 United States VS China: Immersion Cooling Production Comparison (2021 & 2025 & 2032)
  - 4.2.2 United States VS China: Immersion Cooling Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Immersion Cooling Consumption Comparison
  - 4.3.1 United States VS China: Immersion Cooling Consumption Comparison (2021 & 2025 & 2032)
  - 4.3.2 United States VS China: Immersion Cooling Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Immersion Cooling Manufacturers and Market Share, 2021-2026
  - 4.4.1 United States Based Immersion Cooling Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Immersion Cooling Production Value (2021-2026)

4.4.3 United States Based Manufacturers Immersion Cooling Production (2021-2026)

4.5 China Based Immersion Cooling Manufacturers and Market Share

4.5.1 China Based Immersion Cooling Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Immersion Cooling Production Value (2021-2026)

4.5.3 China Based Manufacturers Immersion Cooling Production (2021-2026)

4.6 Rest of World Based Immersion Cooling Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Immersion Cooling Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Immersion Cooling Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Immersion Cooling Production (2021-2026)

## **5 MARKET ANALYSIS BY COOLING PHASE**

5.1 World Immersion Cooling Market Size Overview by Cooling Phase: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Cooling Phase

5.2.1 Single-Phase Immersion Cooling

5.2.2 Two-Phase Immersion Cooling

5.3 Market Segment by Cooling Phase

5.3.1 World Immersion Cooling Production by Cooling Phase (2021-2032)

5.3.2 World Immersion Cooling Production Value by Cooling Phase (2021-2032)

5.3.3 World Immersion Cooling Average Price by Cooling Phase (2021-2032)

## **6 MARKET ANALYSIS BY IMMERSION ARCHITECTURE**

6.1 World Immersion Cooling Market Size Overview by Immersion Architecture: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Immersion Architecture

6.2.1 Open-Bath Tank System

6.2.2 Enclosed-Chassis System

6.2.3 Hybrid Architecture System

6.3 Market Segment by Immersion Architecture

6.3.1 World Immersion Cooling Production by Immersion Architecture (2021-2032)

6.3.2 World Immersion Cooling Production Value by Immersion Architecture

(2021-2032)

6.3.3 World Immersion Cooling Average Price by Immersion Architecture (2021-2032)

## **7 MARKET ANALYSIS BY SYSTEM CAPACITY**

7.1 World Immersion Cooling Market Size Overview by System Capacity: 2021 VS 2025 VS 2032

7.2 Segment Introduction by System Capacity

7.2.1 Less than 100 kW

7.2.2 100-200 kW

7.2.3 Greater than 200 kW

7.3 Market Segment by System Capacity

7.3.1 World Immersion Cooling Production by System Capacity (2021-2032)

7.3.2 World Immersion Cooling Production Value by System Capacity (2021-2032)

7.3.3 World Immersion Cooling Average Price by System Capacity (2021-2032)

## **8 MARKET ANALYSIS BY APPLICATION**

8.1 World Immersion Cooling Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 High Performance Computing

8.2.2 Artificial Intelligence

8.2.3 Edge Computing

8.2.4 Cryptocurrency Mining

8.2.5 Cloud Computing

8.2.6 Others

8.3 Market Segment by Application

8.3.1 World Immersion Cooling Production by Application (2021-2032)

8.3.2 World Immersion Cooling Production Value by Application (2021-2032)

8.3.3 World Immersion Cooling Average Price by Application (2021-2032)

## **9 COMPANY PROFILES**

9.1 Submer

9.1.1 Submer Details

9.1.2 Submer Major Business

9.1.3 Submer Immersion Cooling Product and Services

9.1.4 Submer Immersion Cooling Production, Price, Value, Gross Margin and Market

## Share (2021-2026)

### 9.1.5 Submer Recent Developments/Updates

### 9.1.6 Submer Competitive Strengths & Weaknesses

## 9.2 LiquidStack

### 9.2.1 LiquidStack Details

### 9.2.2 LiquidStack Major Business

### 9.2.3 LiquidStack Immersion Cooling Product and Services

### 9.2.4 LiquidStack Immersion Cooling Production, Price, Value, Gross Margin and

## Market Share (2021-2026)

### 9.2.5 LiquidStack Recent Developments/Updates

### 9.2.6 LiquidStack Competitive Strengths & Weaknesses

## 9.3 Green Revolution Cooling

### 9.3.1 Green Revolution Cooling Details

### 9.3.2 Green Revolution Cooling Major Business

### 9.3.3 Green Revolution Cooling Immersion Cooling Product and Services

### 9.3.4 Green Revolution Cooling Immersion Cooling Production, Price, Value, Gross

## Margin and Market Share (2021-2026)

### 9.3.5 Green Revolution Cooling Recent Developments/Updates

### 9.3.6 Green Revolution Cooling Competitive Strengths & Weaknesses

## 9.4 Midas Immersion Cooling

### 9.4.1 Midas Immersion Cooling Details

### 9.4.2 Midas Immersion Cooling Major Business

### 9.4.3 Midas Immersion Cooling Immersion Cooling Product and Services

### 9.4.4 Midas Immersion Cooling Immersion Cooling Production, Price, Value, Gross

## Margin and Market Share (2021-2026)

### 9.4.5 Midas Immersion Cooling Recent Developments/Updates

### 9.4.6 Midas Immersion Cooling Competitive Strengths & Weaknesses

## 9.5 Vertiv

### 9.5.1 Vertiv Details

### 9.5.2 Vertiv Major Business

### 9.5.3 Vertiv Immersion Cooling Product and Services

### 9.5.4 Vertiv Immersion Cooling Production, Price, Value, Gross Margin and Market

## Share (2021-2026)

### 9.5.5 Vertiv Recent Developments/Updates

### 9.5.6 Vertiv Competitive Strengths & Weaknesses

## 9.6 Baltimore Aircoil Company

### 9.6.1 Baltimore Aircoil Company Details

### 9.6.2 Baltimore Aircoil Company Major Business

### 9.6.3 Baltimore Aircoil Company Immersion Cooling Product and Services

9.6.4 Baltimore Aircoil Company Immersion Cooling Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Baltimore Aircoil Company Recent Developments/Updates

9.6.6 Baltimore Aircoil Company Competitive Strengths & Weaknesses

9.7 GIGABYTE Technology

9.7.1 GIGABYTE Technology Details

9.7.2 GIGABYTE Technology Major Business

9.7.3 GIGABYTE Technology Immersion Cooling Product and Services

9.7.4 GIGABYTE Technology Immersion Cooling Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 GIGABYTE Technology Recent Developments/Updates

9.7.6 GIGABYTE Technology Competitive Strengths & Weaknesses

9.8 Wiyynn

9.8.1 Wiyynn Details

9.8.2 Wiyynn Major Business

9.8.3 Wiyynn Immersion Cooling Product and Services

9.8.4 Wiyynn Immersion Cooling Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Wiyynn Recent Developments/Updates

9.8.6 Wiyynn Competitive Strengths & Weaknesses

9.9 Inventec

9.9.1 Inventec Details

9.9.2 Inventec Major Business

9.9.3 Inventec Immersion Cooling Product and Services

9.9.4 Inventec Immersion Cooling Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Inventec Recent Developments/Updates

9.9.6 Inventec Competitive Strengths & Weaknesses

9.10 DCX Liquid Cooling Systems

9.10.1 DCX Liquid Cooling Systems Details

9.10.2 DCX Liquid Cooling Systems Major Business

9.10.3 DCX Liquid Cooling Systems Immersion Cooling Product and Services

9.10.4 DCX Liquid Cooling Systems Immersion Cooling Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 DCX Liquid Cooling Systems Recent Developments/Updates

9.10.6 DCX Liquid Cooling Systems Competitive Strengths & Weaknesses

9.11 Asperitas

9.11.1 Asperitas Details

9.11.2 Asperitas Major Business

- 9.11.3 Asperitas Immersion Cooling Product and Services
- 9.11.4 Asperitas Immersion Cooling Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.11.5 Asperitas Recent Developments/Updates
- 9.11.6 Asperitas Competitive Strengths & Weaknesses
- 9.12 Iceotope
  - 9.12.1 Iceotope Details
  - 9.12.2 Iceotope Major Business
  - 9.12.3 Iceotope Immersion Cooling Product and Services
  - 9.12.4 Iceotope Immersion Cooling Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.12.5 Iceotope Recent Developments/Updates
  - 9.12.6 Iceotope Competitive Strengths & Weaknesses
- 9.13 LiquidCool Solutions
  - 9.13.1 LiquidCool Solutions Details
  - 9.13.2 LiquidCool Solutions Major Business
  - 9.13.3 LiquidCool Solutions Immersion Cooling Product and Services
  - 9.13.4 LiquidCool Solutions Immersion Cooling Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.13.5 LiquidCool Solutions Recent Developments/Updates
  - 9.13.6 LiquidCool Solutions Competitive Strengths & Weaknesses
- 9.14 Sugon Data Infrastructure Innovation
  - 9.14.1 Sugon Data Infrastructure Innovation Details
  - 9.14.2 Sugon Data Infrastructure Innovation Major Business
  - 9.14.3 Sugon Data Infrastructure Innovation Immersion Cooling Product and Services
  - 9.14.4 Sugon Data Infrastructure Innovation Immersion Cooling Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.14.5 Sugon Data Infrastructure Innovation Recent Developments/Updates
  - 9.14.6 Sugon Data Infrastructure Innovation Competitive Strengths & Weaknesses
- 9.15 ZTE
  - 9.15.1 ZTE Details
  - 9.15.2 ZTE Major Business
  - 9.15.3 ZTE Immersion Cooling Product and Services
  - 9.15.4 ZTE Immersion Cooling Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.15.5 ZTE Recent Developments/Updates
  - 9.15.6 ZTE Competitive Strengths & Weaknesses
- 9.16 Zhejiang Mers Cooling Technology
  - 9.16.1 Zhejiang Mers Cooling Technology Details

- 9.16.2 Zhejiang Mers Cooling Technology Major Business
- 9.16.3 Zhejiang Mers Cooling Technology Immersion Cooling Product and Services
- 9.16.4 Zhejiang Mers Cooling Technology Immersion Cooling Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.16.5 Zhejiang Mers Cooling Technology Recent Developments/Updates
- 9.16.6 Zhejiang Mers Cooling Technology Competitive Strengths & Weaknesses
- 9.17 BEEHE Technology
  - 9.17.1 BEEHE Technology Details
  - 9.17.2 BEEHE Technology Major Business
  - 9.17.3 BEEHE Technology Immersion Cooling Product and Services
  - 9.17.4 BEEHE Technology Immersion Cooling Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.17.5 BEEHE Technology Recent Developments/Updates
  - 9.17.6 BEEHE Technology Competitive Strengths & Weaknesses
- 9.18 Haiwu Technology
  - 9.18.1 Haiwu Technology Details
  - 9.18.2 Haiwu Technology Major Business
  - 9.18.3 Haiwu Technology Immersion Cooling Product and Services
  - 9.18.4 Haiwu Technology Immersion Cooling Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.18.5 Haiwu Technology Recent Developments/Updates
  - 9.18.6 Haiwu Technology Competitive Strengths & Weaknesses

## **10 INDUSTRY CHAIN ANALYSIS**

- 10.1 Immersion Cooling Industry Chain
- 10.2 Immersion Cooling Upstream Analysis
  - 10.2.1 Immersion Cooling Core Raw Materials
  - 10.2.2 Main Manufacturers of Immersion Cooling Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Immersion Cooling Production Mode
- 10.6 Immersion Cooling Procurement Model
- 10.7 Immersion Cooling Industry Sales Model and Sales Channels
  - 10.7.1 Immersion Cooling Sales Model
  - 10.7.2 Immersion Cooling Typical Distributors

## **11 RESEARCH FINDINGS AND CONCLUSION**

## **12 APPENDIX**

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

## List Of Tables

### LIST OF TABLES

Table 1. World Immersion Cooling Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Immersion Cooling Production Value by Region (2021-2026) & (USD Million)

Table 3. World Immersion Cooling Production Value by Region (2027-2032) & (USD Million)

Table 4. World Immersion Cooling Production Value Market Share by Region (2021-2026)

Table 5. World Immersion Cooling Production Value Market Share by Region (2027-2032)

Table 6. World Immersion Cooling Production by Region (2021-2026) & (kW)

Table 7. World Immersion Cooling Production by Region (2027-2032) & (kW)

Table 8. World Immersion Cooling Production Market Share by Region (2021-2026)

Table 9. World Immersion Cooling Production Market Share by Region (2027-2032)

Table 10. World Immersion Cooling Average Price by Region (2021-2026) & (US\$/kW)

Table 11. World Immersion Cooling Average Price by Region (2027-2032) & (US\$/kW)

Table 12. Immersion Cooling Major Market Trends

Table 13. World Immersion Cooling Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (kW)

Table 14. World Immersion Cooling Consumption by Region (2021-2026) & (kW)

Table 15. World Immersion Cooling Consumption Forecast by Region (2027-2032) & (kW)

Table 16. World Immersion Cooling Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Immersion Cooling Producers in 2025

Table 18. World Immersion Cooling Production by Manufacturer (2021-2026) & (kW)

Table 19. Production Market Share of Key Immersion Cooling Producers in 2025

Table 20. World Immersion Cooling Average Price by Manufacturer (2021-2026) & (US\$/kW)

Table 21. Global Immersion Cooling Company Evaluation Quadrant

Table 22. World Immersion Cooling Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Immersion Cooling Production Site of Key Manufacturer

Table 24. Immersion Cooling Market: Company Product Type Footprint

Table 25. Immersion Cooling Market: Company Product Application Footprint

Table 26. Immersion Cooling Competitive Factors

Table 27. Immersion Cooling New Entrant and Capacity Expansion Plans

Table 28. Immersion Cooling Mergers & Acquisitions Activity

Table 29. United States VS China Immersion Cooling Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Immersion Cooling Production Comparison, (2021 & 2025 & 2032) & (kW)

Table 31. United States VS China Immersion Cooling Consumption Comparison, (2021 & 2025 & 2032) & (kW)

Table 32. United States Based Immersion Cooling Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Immersion Cooling Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Immersion Cooling Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Immersion Cooling Production (2021-2026) & (kW)

Table 36. United States Based Manufacturers Immersion Cooling Production Market Share (2021-2026)

Table 37. China Based Immersion Cooling Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Immersion Cooling Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Immersion Cooling Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Immersion Cooling Production, (2021-2026) & (kW)

Table 41. China Based Manufacturers Immersion Cooling Production Market Share (2021-2026)

Table 42. Rest of World Based Immersion Cooling Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Immersion Cooling Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Immersion Cooling Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Immersion Cooling Production, (2021-2026) & (kW)

Table 46. Rest of World Based Manufacturers Immersion Cooling Production Market Share (2021-2026)

Table 47. World Immersion Cooling Production Value by Cooling Phase, (USD Million), 2021 & 2025 & 2032

Table 48. World Immersion Cooling Production by Cooling Phase (2021-2026) & (kW)

Table 49. World Immersion Cooling Production by Cooling Phase (2027-2032) & (kW)

Table 50. World Immersion Cooling Production Value by Cooling Phase (2021-2026) & (USD Million)

Table 51. World Immersion Cooling Production Value by Cooling Phase (2027-2032) & (USD Million)

Table 52. World Immersion Cooling Average Price by Cooling Phase (2021-2026) & (US\$/kW)

Table 53. World Immersion Cooling Average Price by Cooling Phase (2027-2032) & (US\$/kW)

Table 54. World Immersion Cooling Production Value by Immersion Architecture, (USD Million), 2021 & 2025 & 2032

Table 55. World Immersion Cooling Production by Immersion Architecture (2021-2026) & (kW)

Table 56. World Immersion Cooling Production by Immersion Architecture (2027-2032) & (kW)

Table 57. World Immersion Cooling Production Value by Immersion Architecture (2021-2026) & (USD Million)

Table 58. World Immersion Cooling Production Value by Immersion Architecture (2027-2032) & (USD Million)

Table 59. World Immersion Cooling Average Price by Immersion Architecture (2021-2026) & (US\$/kW)

Table 60. World Immersion Cooling Average Price by Immersion Architecture (2027-2032) & (US\$/kW)

Table 61. World Immersion Cooling Production Value by System Capacity, (USD Million), 2021 & 2025 & 2032

Table 62. World Immersion Cooling Production by System Capacity (2021-2026) & (kW)

Table 63. World Immersion Cooling Production by System Capacity (2027-2032) & (kW)

Table 64. World Immersion Cooling Production Value by System Capacity (2021-2026) & (USD Million)

Table 65. World Immersion Cooling Production Value by System Capacity (2027-2032) & (USD Million)

Table 66. World Immersion Cooling Average Price by System Capacity (2021-2026) & (US\$/kW)

Table 67. World Immersion Cooling Average Price by System Capacity (2027-2032) & (US\$/kW)

Table 68. World Immersion Cooling Production Value by Application, (USD Million),

## 2021 &amp; 2025 &amp; 2032

Table 69. World Immersion Cooling Production by Application (2021-2026) &amp; (kW)

Table 70. World Immersion Cooling Production by Application (2027-2032) &amp; (kW)

Table 71. World Immersion Cooling Production Value by Application (2021-2026) &amp; (USD Million)

Table 72. World Immersion Cooling Production Value by Application (2027-2032) &amp; (USD Million)

Table 73. World Immersion Cooling Average Price by Application (2021-2026) &amp; (US\$/kW)

Table 74. World Immersion Cooling Average Price by Application (2027-2032) &amp; (US\$/kW)

Table 75. Submer Basic Information, Manufacturing Base and Competitors

Table 76. Submer Major Business

Table 77. Submer Immersion Cooling Product and Services

Table 78. Submer Immersion Cooling Production (kW), Price (US\$/kW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Submer Recent Developments/Updates

Table 80. Submer Competitive Strengths &amp; Weaknesses

Table 81. LiquidStack Basic Information, Manufacturing Base and Competitors

Table 82. LiquidStack Major Business

Table 83. LiquidStack Immersion Cooling Product and Services

Table 84. LiquidStack Immersion Cooling Production (kW), Price (US\$/kW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. LiquidStack Recent Developments/Updates

Table 86. LiquidStack Competitive Strengths &amp; Weaknesses

Table 87. Green Revolution Cooling Basic Information, Manufacturing Base and Competitors

Table 88. Green Revolution Cooling Major Business

Table 89. Green Revolution Cooling Immersion Cooling Product and Services

Table 90. Green Revolution Cooling Immersion Cooling Production (kW), Price (US\$/kW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Green Revolution Cooling Recent Developments/Updates

Table 92. Green Revolution Cooling Competitive Strengths &amp; Weaknesses

Table 93. Midas Immersion Cooling Basic Information, Manufacturing Base and Competitors

Table 94. Midas Immersion Cooling Major Business

Table 95. Midas Immersion Cooling Immersion Cooling Product and Services

Table 96. Midas Immersion Cooling Immersion Cooling Production (kW), Price

(US\$/kW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Midas Immersion Cooling Recent Developments/Updates

Table 98. Midas Immersion Cooling Competitive Strengths & Weaknesses

Table 99. Vertiv Basic Information, Manufacturing Base and Competitors

Table 100. Vertiv Major Business

Table 101. Vertiv Immersion Cooling Product and Services

Table 102. Vertiv Immersion Cooling Production (kW), Price (US\$/kW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Vertiv Recent Developments/Updates

Table 104. Vertiv Competitive Strengths & Weaknesses

Table 105. Baltimore Aircoil Company Basic Information, Manufacturing Base and Competitors

Table 106. Baltimore Aircoil Company Major Business

Table 107. Baltimore Aircoil Company Immersion Cooling Product and Services

Table 108. Baltimore Aircoil Company Immersion Cooling Production (kW), Price (US\$/kW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Baltimore Aircoil Company Recent Developments/Updates

Table 110. Baltimore Aircoil Company Competitive Strengths & Weaknesses

Table 111. GIGABYTE Technology Basic Information, Manufacturing Base and Competitors

Table 112. GIGABYTE Technology Major Business

Table 113. GIGABYTE Technology Immersion Cooling Product and Services

Table 114. GIGABYTE Technology Immersion Cooling Production (kW), Price (US\$/kW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. GIGABYTE Technology Recent Developments/Updates

Table 116. GIGABYTE Technology Competitive Strengths & Weaknesses

Table 117. Wiwynn Basic Information, Manufacturing Base and Competitors

Table 118. Wiwynn Major Business

Table 119. Wiwynn Immersion Cooling Product and Services

Table 120. Wiwynn Immersion Cooling Production (kW), Price (US\$/kW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Wiwynn Recent Developments/Updates

Table 122. Wiwynn Competitive Strengths & Weaknesses

Table 123. Inventec Basic Information, Manufacturing Base and Competitors

Table 124. Inventec Major Business

Table 125. Inventec Immersion Cooling Product and Services

Table 126. Inventec Immersion Cooling Production (kW), Price (US\$/kW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Inventec Recent Developments/Updates

Table 128. Inventec Competitive Strengths & Weaknesses

Table 129. DCX Liquid Cooling Systems Basic Information, Manufacturing Base and Competitors

Table 130. DCX Liquid Cooling Systems Major Business

Table 131. DCX Liquid Cooling Systems Immersion Cooling Product and Services

Table 132. DCX Liquid Cooling Systems Immersion Cooling Production (kW), Price (US\$/kW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. DCX Liquid Cooling Systems Recent Developments/Updates

Table 134. DCX Liquid Cooling Systems Competitive Strengths & Weaknesses

Table 135. Asperitas Basic Information, Manufacturing Base and Competitors

Table 136. Asperitas Major Business

Table 137. Asperitas Immersion Cooling Product and Services

Table 138. Asperitas Immersion Cooling Production (kW), Price (US\$/kW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Asperitas Recent Developments/Updates

Table 140. Asperitas Competitive Strengths & Weaknesses

Table 141. Iceotope Basic Information, Manufacturing Base and Competitors

Table 142. Iceotope Major Business

Table 143. Iceotope Immersion Cooling Product and Services

Table 144. Iceotope Immersion Cooling Production (kW), Price (US\$/kW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Iceotope Recent Developments/Updates

Table 146. Iceotope Competitive Strengths & Weaknesses

Table 147. LiquidCool Solutions Basic Information, Manufacturing Base and Competitors

Table 148. LiquidCool Solutions Major Business

Table 149. LiquidCool Solutions Immersion Cooling Product and Services

Table 150. LiquidCool Solutions Immersion Cooling Production (kW), Price (US\$/kW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. LiquidCool Solutions Recent Developments/Updates

Table 152. LiquidCool Solutions Competitive Strengths & Weaknesses

Table 153. Sugon Data Infrastructure Innovation Basic Information, Manufacturing Base and Competitors

Table 154. Sugon Data Infrastructure Innovation Major Business

Table 155. Sugon Data Infrastructure Innovation Immersion Cooling Product and

## Services

Table 156. Sugon Data Infrastructure Innovation Immersion Cooling Production (kW), Price (US\$/kW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Sugon Data Infrastructure Innovation Recent Developments/Updates

Table 158. Sugon Data Infrastructure Innovation Competitive Strengths & Weaknesses

Table 159. ZTE Basic Information, Manufacturing Base and Competitors

Table 160. ZTE Major Business

Table 161. ZTE Immersion Cooling Product and Services

Table 162. ZTE Immersion Cooling Production (kW), Price (US\$/kW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. ZTE Recent Developments/Updates

Table 164. ZTE Competitive Strengths & Weaknesses

Table 165. Zhejiang Mers Cooling Technology Basic Information, Manufacturing Base and Competitors

Table 166. Zhejiang Mers Cooling Technology Major Business

Table 167. Zhejiang Mers Cooling Technology Immersion Cooling Product and Services

Table 168. Zhejiang Mers Cooling Technology Immersion Cooling Production (kW), Price (US\$/kW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. Zhejiang Mers Cooling Technology Recent Developments/Updates

Table 170. Zhejiang Mers Cooling Technology Competitive Strengths & Weaknesses

Table 171. BEEHE Technology Basic Information, Manufacturing Base and Competitors

Table 172. BEEHE Technology Major Business

Table 173. BEEHE Technology Immersion Cooling Product and Services

Table 174. BEEHE Technology Immersion Cooling Production (kW), Price (US\$/kW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 175. BEEHE Technology Recent Developments/Updates

Table 176. BEEHE Technology Competitive Strengths & Weaknesses

Table 177. Haiwu Technology Basic Information, Manufacturing Base and Competitors

Table 178. Haiwu Technology Major Business

Table 179. Haiwu Technology Immersion Cooling Product and Services

Table 180. Haiwu Technology Immersion Cooling Production (kW), Price (US\$/kW), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 181. Haiwu Technology Recent Developments/Updates

Table 182. Haiwu Technology Competitive Strengths & Weaknesses

Table 183. Global Key Players of Immersion Cooling Upstream (Raw Materials)

Table 184. Global Immersion Cooling Typical Customers

Table 185. Immersion Cooling Typical Distributors



## List Of Figures

### LIST OF FIGURES

Figure 1. Immersion Cooling Picture

Figure 2. World Immersion Cooling Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Immersion Cooling Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Immersion Cooling Production (2021-2032) & (kW)

Figure 5. World Immersion Cooling Average Price (2021-2032) & (US\$/kW)

Figure 6. World Immersion Cooling Production Value Market Share by Region (2021-2032)

Figure 7. World Immersion Cooling Production Market Share by Region (2021-2032)

Figure 8. North America Immersion Cooling Production (2021-2032) & (kW)

Figure 9. Europe Immersion Cooling Production (2021-2032) & (kW)

Figure 10. China Immersion Cooling Production (2021-2032) & (kW)

Figure 11. China Taiwan Immersion Cooling Production (2021-2032) & (kW)

Figure 12. Immersion Cooling Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Immersion Cooling Consumption (2021-2032) & (kW)

Figure 15. World Immersion Cooling Consumption Market Share by Region (2021-2032)

Figure 16. United States Immersion Cooling Consumption (2021-2032) & (kW)

Figure 17. China Immersion Cooling Consumption (2021-2032) & (kW)

Figure 18. Europe Immersion Cooling Consumption (2021-2032) & (kW)

Figure 19. Japan Immersion Cooling Consumption (2021-2032) & (kW)

Figure 20. South Korea Immersion Cooling Consumption (2021-2032) & (kW)

Figure 21. ASEAN Immersion Cooling Consumption (2021-2032) & (kW)

Figure 22. India Immersion Cooling Consumption (2021-2032) & (kW)

Figure 23. Producer Shipments of Immersion Cooling by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Immersion Cooling Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Immersion Cooling Markets in 2025

Figure 26. United States VS China: Immersion Cooling Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Immersion Cooling Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Immersion Cooling Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Immersion Cooling Production Market Share 2025

Figure 30. China Based Manufacturers Immersion Cooling Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Immersion Cooling Production Market Share 2025

Figure 32. World Immersion Cooling Production Value by Cooling Phase, (USD Million), 2021 & 2025 & 2032

Figure 33. World Immersion Cooling Production Value Market Share by Cooling Phase in 2025

Figure 34. Single-Phase Immersion Cooling

Figure 35. Two-Phase Immersion Cooling

Figure 36. World Immersion Cooling Production Market Share by Cooling Phase (2021-2032)

Figure 37. World Immersion Cooling Production Value Market Share by Cooling Phase (2021-2032)

Figure 38. World Immersion Cooling Average Price by Cooling Phase (2021-2032) & (US\$/kW)

Figure 39. World Immersion Cooling Production Value by Immersion Architecture, (USD Million), 2021 & 2025 & 2032

Figure 40. World Immersion Cooling Production Value Market Share by Immersion Architecture in 2025

Figure 41. Open-Bath Tank System

Figure 42. Enclosed-Chassis System

Figure 43. Hybrid Architecture System

Figure 44. World Immersion Cooling Production Market Share by Immersion Architecture (2021-2032)

Figure 45. World Immersion Cooling Production Value Market Share by Immersion Architecture (2021-2032)

Figure 46. World Immersion Cooling Average Price by Immersion Architecture (2021-2032) & (US\$/kW)

Figure 47. World Immersion Cooling Production Value by System Capacity, (USD Million), 2021 & 2025 & 2032

Figure 48. World Immersion Cooling Production Value Market Share by System Capacity in 2025

Figure 49. Less than 100 kW

Figure 50. 100-200 kW

Figure 51. Greater than 200 kW

Figure 52. World Immersion Cooling Production Market Share by System Capacity (2021-2032)

Figure 53. World Immersion Cooling Production Value Market Share by System Capacity (2021-2032)

Figure 54. World Immersion Cooling Average Price by System Capacity (2021-2032) & (US\$/kW)

Figure 55. World Immersion Cooling Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 56. World Immersion Cooling Production Value Market Share by Application in 2025

Figure 57. High Performance Computing

Figure 58. Artificial Intelligence

Figure 59. Edge Computing

Figure 60. Cryptocurrency Mining

Figure 61. Cloud Computing

Figure 62. Others

Figure 63. World Immersion Cooling Production Market Share by Application (2021-2032)

Figure 64. World Immersion Cooling Production Value Market Share by Application (2021-2032)

Figure 65. World Immersion Cooling Average Price by Application (2021-2032) & (US\$/kW)

Figure 66. Immersion Cooling Industry Chain

Figure 67. Immersion Cooling Procurement Model

Figure 68. Immersion Cooling Sales Model

Figure 69. Immersion Cooling Sales Channels, Direct Sales, and Distribution

Figure 70. Methodology

Figure 71. Research Process and Data Source

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