

Global Intelligent Thermal-Fluid Simulation Software Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G46203CABF99EN.html>

Date: September 2026

Pages: 132

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

ID: G46203CABF99EN

Abstracts

The global Intelligent Thermal-Fluid Simulation Software market size is expected to reach \$ 6274 million by 2032, rising at a market growth of 12.6% CAGR during the forecast period (2026-2032).

Intelligent thermal-fluid simulation software is an engineering simulation tool designed to model, predict, and optimize fluid flow, temperature fields, heat transfer, interphase interactions, and related thermal-fluid physical processes. It is built upon core technologies including computational fluid dynamics (CFD), heat transfer analysis, multiphysics coupling, numerical solvers, and intelligent algorithms. Its functional scope spans from geometry processing and automated mesh generation to solver configuration, high-performance computing, result visualization, design optimization, and AI-assisted prediction. Key capabilities encompass laminar and turbulent flows, heat conduction, convection, radiation, conjugate heat transfer, multiphase flow, and fluid-structure or other multiphysics coupling, while progressively integrating features such as intelligent modeling, AI-assisted meshing, solver acceleration, surrogate modeling, reduced-order modeling, and rapid prediction. This software primarily serves industries with rigorous requirements for thermal management, fluid dynamics, and design optimization, such as automotive, aerospace and defense, energy and power, electronics and semiconductors, and industrial manufacturing.

Key Findings

AI is rapidly becoming a core simulation capability.

Large-scale model acceleration is shifting toward HPC cloud computing

resources.

Demand for electronics thermal management and battery thermal management remains robust.

Multi-physics coupling is evolving toward system-level simulation.

The substitution process for domestic CAE software continues to deepen.

Industry Trends

Intelligent thermal-fluid simulation software is evolving from traditional CFD tools centered on numerical solvers into integrated, intelligent engineering simulation platforms. The most significant industry shift is the deepening integration of high-fidelity physical simulation with artificial intelligence; AI applications have expanded beyond post-processing to include automated pre-processing, parameter recommendation, convergence assistance, surrogate modeling, reduced-order modeling, and rapid design space exploration.

Market Dynamics

Drivers

The core driver of the intelligent thermal-fluid simulation software market is the increasing complexity of product thermal management and fluid system design. Rising power densities in semiconductors, AI servers, power electronics, and battery systems have made thermal management a critical constraint in product design. Furthermore, trends such as vehicle electrification, equipment lightweighting, improved energy efficiency, and the growing complexity of aerospace and energy equipment necessitate more accurate prediction of coupled fluid flow and heat transfer behaviors. Simultaneously, manufacturing enterprises face a universal need to shorten R&D cycles, reduce physical prototype testing, and improve first-pass design success rates, further driving the adoption of virtual verification, automated optimization, and high-throughput simulation.

Constraints

The computational costs and technical complexity associated with high-fidelity thermal-fluid simulation remain significant barriers to market expansion. Large-scale meshing, transient calculations, multiphase flow, combustion, and strongly coupled multi-physics problems typically require substantial computing power and long solution times. Additionally, result reliability depends heavily on physical models, boundary conditions, mesh quality, and numerical settings, placing high demands on users' expertise in fluid dynamics, heat transfer, and numerical computation. For small and medium-sized industrial users, the combined costs of software licensing, HPC infrastructure, implementation, and specialized engineering personnel result in a high total cost of ownership. While AI-assisted technologies can lower certain barriers to modeling and computation, their effectiveness relies on representative, high-quality simulation or experimental data; consequently, they cannot fully replace validated physical solvers in the short term.

Market Opportunities

Future opportunities with the greatest potential lie in scenarios where the computational speed of traditional high-fidelity CFD cannot meet the demands of rapid engineering decision-making. AI surrogate models, reduced-order models, and geometric deep learning can transform time-consuming, high-fidelity computations into tools for rapid prediction and large-scale design exploration.

Industry Risks and Challenges

A core, long-standing challenge in the industry is balancing computational speed, physical accuracy, and engineering reliability. While AI models can significantly reduce prediction times, their accuracy depends on the coverage of training samples and the quality of underlying simulation and experimental data. Prediction uncertainty can rise sharply when geometries, operating conditions, or physical mechanisms fall outside the training scope; consequently, rigorous verification and validation systems remain essential for high-reliability sectors such as aerospace and energy equipment.

Value Chain Analysis

The upstream segment of the intelligent thermal-fluid simulation software value chain comprises numerical algorithms, physical models, geometry and meshing technologies, AI algorithm frameworks, and computing infrastructure. Key components include CFD

and heat transfer algorithms, turbulence and multiphase flow models, numerical linear algebra, mesh generation, optimization algorithms, machine learning architectures, and resources such as CPUs, GPUs, HPC systems, and cloud computing. These foundational capabilities collectively determine the software's solution accuracy, computational efficiency, scalability, and the range of engineering physics problems it can address. As computing platforms evolve toward heterogeneous architectures, optimizing solvers for massive parallel computing and diverse processing architectures is becoming a critical aspect of value creation at the software's core.

Midstream vendors transform underlying algorithms into commercial simulation software platforms through solver development, graphical user interfaces, automated pre-processing, workflow orchestration, result visualization, AI modules, industry-specific templates, and engineering technical services. Market value is shifting from a focus on standalone "solver capabilities" to overall "engineering R&D efficiency." Customers increasingly prioritize automated geometry processing, stable mesh generation, multiphysics coupling, parametric batch computing, AI acceleration, and reusable simulation workflows.

Market Segment Analysis

Based on computational mesh size, intelligent thermal-fluid simulation software can be categorized into small-scale software (1 million cells or fewer), medium-scale products (1 million to 10 million cells), large-scale products (10 million to 100 million cells), and ultra-large-scale products (exceeding 100 million cells). As geometric complexity, transient analysis precision, and the number of coupled physical fields increase, the computational demands of industrial clients are shifting toward larger-scale models. Consequently, the ability to stably handle meshes ranging from tens of millions to hundreds of millions of elements is becoming a key technical differentiator between enterprise-grade software and lightweight engineering tools. With the growing importance of large-scale parallel meshing and distributed solving capabilities, PERA SIM products have already established capabilities for generating and processing meshes at the billion-element scale.

Products can be categorized by their physical field coupling capabilities into single-field, dual-field, multi-field (3–4 fields), and highly coupled (5+ fields) systems. Regarding intelligence levels, this study classifies products with AI functionality below 10% as "traditional simulation," 10%–30% as "AI-assisted," 30%–60% as "AI-enhanced," and above 60% as "AI-native intelligent simulation." Market trends are evolving from AI-

assisted preprocessing toward AI-driven prediction, surrogate modeling, and intelligent optimization, although high-fidelity engineering validation remains grounded in physics-based solvers.

Downstream Market Opportunities

Automotive, aerospace and defense, energy and power, electronics and semiconductors, and industrial manufacturing constitute the primary downstream markets for intelligent thermal-fluid simulation software. Opportunities in the electronics and semiconductor sectors are particularly significant; rising chip power densities, advanced packaging, AI computing hardware, and liquid cooling for data centers all require increasingly complex conjugate heat transfer and flow field analyses.

Meanwhile, the new energy vehicle sector is driving demand for simulations covering battery thermal management, cooling for electric motors and power electronics, cabin thermal management, and vehicle aerodynamics. The aerospace and energy industries focus on high-fidelity analysis of aerothermodynamics, combustion, turbomachinery, heat exchange equipment, and complex machinery, whereas industrial manufacturing clients primarily utilize CFD to optimize pumps, compressors, reactors, and process equipment. Emerging applications—such as hydrogen fuel cells, energy storage systems, digital twins, and real-time thermal state prediction—will further extend the scope of thermal-fluid simulation from the R&D and design phases into operational optimization.

Report Scope

This report studies the global Intelligent Thermal-Fluid Simulation Software demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Intelligent Thermal-Fluid Simulation Software, 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 Intelligent Thermal-Fluid Simulation Software that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Intelligent Thermal-Fluid Simulation Software total market, 2021-2032, (USD Million)

Global Intelligent Thermal-Fluid Simulation Software total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Intelligent Thermal-Fluid Simulation Software total market, key domestic companies, and share, (USD Million)

Global Intelligent Thermal-Fluid Simulation Software revenue by player, revenue and market share 2021-2026, (USD Million)

Global Intelligent Thermal-Fluid Simulation Software total market by Type, CAGR, 2021-2032, (USD Million)

Global Intelligent Thermal-Fluid Simulation Software total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Intelligent Thermal-Fluid Simulation Software market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Synopsys, Cadence Design Systems, COMSOL, Flow Science, Simerics, Convergent Science, Siemens Digital Industries Software, Dassault Systèmes, AVL List, ENGYS, 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 Intelligent Thermal-Fluid Simulation Software market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 Intelligent Thermal-Fluid Simulation Software Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Intelligent Thermal-Fluid Simulation Software Market, Segmentation by Type:

Single-Physics Type (1 Physical Field)

Dual-Physics Coupling Type (2 Physical Fields)

Multi-Physics Coupling Type (3–4 Physical Fields)

Highly Multi-Physics Type (?5 Physical Fields)

Global Intelligent Thermal-Fluid Simulation Software Market, Segmentation by Real-Time Capability:

Offline High-Precision Simulation

Rapid Simulation

Near-Real-Time Simulation

Real-Time Simulation

Global Intelligent Thermal-Fluid Simulation Software Market, Segmentation by Precision:

Standard Precision

High Engineering Precision

Global Intelligent Thermal-Fluid Simulation Software Market, Segmentation by Application:

Automotive

Aerospace & Defense

Energy

Electronics & Semiconductors

Industrial

Others

Companies Profiled:

Synopsys

Cadence Design Systems

COMSOL

Flow Science

Simerics

Convergent Science

Siemens Digital Industries Software

Dassault Systèmes

AVL List

ENGYS

SimScale

FIFTY2 Technology

Nanjing Tianfu Software

Pera Global

TenFong Technology

Beijing YunDao Zhizao Technology

ZWSOFT

Prometech Software

AdvanceSoft

Software Cradle

Key Questions Answered

1. How big is the global Intelligent Thermal-Fluid Simulation Software market?
2. What is the demand of the global Intelligent Thermal-Fluid Simulation Software market?
3. What is the year over year growth of the global Intelligent Thermal-Fluid Simulation Software market?
4. What is the total value of the global Intelligent Thermal-Fluid Simulation Software market?
5. Who are the Major Players in the global Intelligent Thermal-Fluid Simulation Software market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

1.1 Intelligent Thermal-Fluid Simulation Software Introduction

1.2 World Intelligent Thermal-Fluid Simulation Software Market Size & Forecast (2021 & 2025 & 2032)

1.3 World Intelligent Thermal-Fluid Simulation Software Total Market by Region (by Headquarter Location)

1.3.1 World Intelligent Thermal-Fluid Simulation Software Market Size by Region (2021-2032), (by Headquarter Location)

1.3.2 United States Based Company Intelligent Thermal-Fluid Simulation Software Revenue (2021-2032)

1.3.3 China Based Company Intelligent Thermal-Fluid Simulation Software Revenue (2021-2032)

1.3.4 Europe Based Company Intelligent Thermal-Fluid Simulation Software Revenue (2021-2032)

1.3.5 Japan Based Company Intelligent Thermal-Fluid Simulation Software Revenue (2021-2032)

1.3.6 South Korea Based Company Intelligent Thermal-Fluid Simulation Software Revenue (2021-2032)

1.3.7 ASEAN Based Company Intelligent Thermal-Fluid Simulation Software Revenue (2021-2032)

1.3.8 India Based Company Intelligent Thermal-Fluid Simulation Software Revenue (2021-2032)

1.4 Market Drivers, Restraints and Trends

1.4.1 Intelligent Thermal-Fluid Simulation Software Market Drivers

1.4.2 Factors Affecting Demand

1.4.3 Major Market Trends

2 DEMAND SUMMARY

2.1 World Intelligent Thermal-Fluid Simulation Software Consumption Value (2021-2032)

2.2 World Intelligent Thermal-Fluid Simulation Software Consumption Value by Region

2.2.1 World Intelligent Thermal-Fluid Simulation Software Consumption Value by Region (2021-2026)

2.2.2 World Intelligent Thermal-Fluid Simulation Software Consumption Value Forecast by Region (2027-2032)

2.3 United States Intelligent Thermal-Fluid Simulation Software Consumption Value (2021-2032)

2.4 China Intelligent Thermal-Fluid Simulation Software Consumption Value (2021-2032)

2.5 Europe Intelligent Thermal-Fluid Simulation Software Consumption Value (2021-2032)

2.6 Japan Intelligent Thermal-Fluid Simulation Software Consumption Value (2021-2032)

2.7 South Korea Intelligent Thermal-Fluid Simulation Software Consumption Value (2021-2032)

2.8 ASEAN Intelligent Thermal-Fluid Simulation Software Consumption Value (2021-2032)

2.9 India Intelligent Thermal-Fluid Simulation Software Consumption Value (2021-2032)

3 WORLD INTELLIGENT THERMAL-FLUID SIMULATION SOFTWARE COMPANIES COMPETITIVE ANALYSIS

3.1 World Intelligent Thermal-Fluid Simulation Software Revenue by Player (2021-2026)

3.2 Industry Rank and Concentration Rate (CR)

3.2.1 Global Intelligent Thermal-Fluid Simulation Software Industry Rank of Major Players

3.2.2 Global Concentration Ratios (CR4) for Intelligent Thermal-Fluid Simulation Software in 2025

3.2.3 Global Concentration Ratios (CR8) for Intelligent Thermal-Fluid Simulation Software in 2025

3.3 Intelligent Thermal-Fluid Simulation Software Company Evaluation Quadrant

3.4 Intelligent Thermal-Fluid Simulation Software Market: Overall Company Footprint Analysis

3.4.1 Intelligent Thermal-Fluid Simulation Software Market: Region Footprint

3.4.2 Intelligent Thermal-Fluid Simulation Software Market: Company Product Type Footprint

3.4.3 Intelligent Thermal-Fluid Simulation Software Market: Company Product Application Footprint

3.5 Competitive Environment

3.5.1 Historical Structure of the Industry

3.5.2 Barriers of Market Entry

3.5.3 Factors of Competition

3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: Intelligent Thermal-Fluid Simulation Software Revenue Comparison (by Headquarter Location)

4.1.1 United States VS China: Intelligent Thermal-Fluid Simulation Software Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)

4.1.2 United States VS China: Intelligent Thermal-Fluid Simulation Software Revenue Market Share Comparison (2021 & 2025 & 2032)

4.2 United States Based Companies VS China Based Companies: Intelligent Thermal-Fluid Simulation Software Consumption Value Comparison

4.2.1 United States VS China: Intelligent Thermal-Fluid Simulation Software Consumption Value Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Intelligent Thermal-Fluid Simulation Software Consumption Value Market Share Comparison (2021 & 2025 & 2032)

4.3 United States Based Intelligent Thermal-Fluid Simulation Software Companies and Market Share, 2021-2026

4.3.1 United States Based Intelligent Thermal-Fluid Simulation Software Companies, Headquarters (States, Country)

4.3.2 United States Based Companies Intelligent Thermal-Fluid Simulation Software Revenue, (2021-2026)

4.4 China Based Companies Intelligent Thermal-Fluid Simulation Software Revenue and Market Share, 2021-2026

4.4.1 China Based Intelligent Thermal-Fluid Simulation Software Companies, Company Headquarters (Province, Country)

4.4.2 China Based Companies Intelligent Thermal-Fluid Simulation Software Revenue, (2021-2026)

4.5 Rest of World Based Intelligent Thermal-Fluid Simulation Software Companies and Market Share, 2021-2026

4.5.1 Rest of World Based Intelligent Thermal-Fluid Simulation Software Companies, Headquarters (Province, Country)

4.5.2 Rest of World Based Companies Intelligent Thermal-Fluid Simulation Software Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Intelligent Thermal-Fluid Simulation Software Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

- 5.2.1 Single-Physics Type (1 Physical Field)
- 5.2.2 Dual-Physics Coupling Type (2 Physical Fields)
- 5.2.3 Multi-Physics Coupling Type (3–4 Physical Fields)
- 5.2.4 Highly Multi-Physics Type (?5 Physical Fields)

5.3 Market Segment by Type

- 5.3.1 World Intelligent Thermal-Fluid Simulation Software Market Size by Type (2021-2026)
- 5.3.2 World Intelligent Thermal-Fluid Simulation Software Market Size by Type (2027-2032)
- 5.3.3 World Intelligent Thermal-Fluid Simulation Software Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY REAL-TIME CAPABILITY

6.1 World Intelligent Thermal-Fluid Simulation Software Market Size Overview by Real-Time Capability: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Real-Time Capability

- 6.2.1 Offline High-Precision Simulation
- 6.2.2 Rapid Simulation
- 6.2.3 Near-Real-Time Simulation
- 6.2.4 Real-Time Simulation

6.3 Market Segment by Real-Time Capability

- 6.3.1 World Intelligent Thermal-Fluid Simulation Software Market Size by Real-Time Capability (2021-2026)
- 6.3.2 World Intelligent Thermal-Fluid Simulation Software Market Size by Real-Time Capability (2027-2032)
- 6.3.3 World Intelligent Thermal-Fluid Simulation Software Market Size Market Share by Real-Time Capability (2027-2032)

7 MARKET ANALYSIS BY PRECISION

7.1 World Intelligent Thermal-Fluid Simulation Software Market Size Overview by Precision: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Precision

- 7.2.1 Standard Precision
- 7.2.2 High Engineering Precision

7.3 Market Segment by Precision

- 7.3.1 World Intelligent Thermal-Fluid Simulation Software Market Size by Precision (2021-2026)

7.3.2 World Intelligent Thermal-Fluid Simulation Software Market Size by Precision (2027-2032)

7.3.3 World Intelligent Thermal-Fluid Simulation Software Market Size Market Share by Precision (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Intelligent Thermal-Fluid Simulation Software Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Automotive

8.2.2 Aerospace & Defense

8.2.3 Energy

8.2.4 Electronics & Semiconductors

8.2.5 Industrial

8.2.6 Others

8.3 Market Segment by Application

8.3.1 World Intelligent Thermal-Fluid Simulation Software Market Size by Application (2021-2026)

8.3.2 World Intelligent Thermal-Fluid Simulation Software Market Size by Application (2027-2032)

8.3.3 World Intelligent Thermal-Fluid Simulation Software Market Size Market Share by Application (2021-2032)

9 COMPANY PROFILES

9.1 Synopsys

9.1.1 Synopsys Details

9.1.2 Synopsys Major Business

9.1.3 Synopsys Intelligent Thermal-Fluid Simulation Software Product and Services

9.1.4 Synopsys Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)

9.1.5 Synopsys Recent Developments/Updates

9.1.6 Synopsys Competitive Strengths & Weaknesses

9.2 Cadence Design Systems

9.2.1 Cadence Design Systems Details

9.2.2 Cadence Design Systems Major Business

9.2.3 Cadence Design Systems Intelligent Thermal-Fluid Simulation Software Product and Services

- 9.2.4 Cadence Design Systems Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)
- 9.2.5 Cadence Design Systems Recent Developments/Updates
- 9.2.6 Cadence Design Systems Competitive Strengths & Weaknesses
- 9.3 COMSOL
 - 9.3.1 COMSOL Details
 - 9.3.2 COMSOL Major Business
 - 9.3.3 COMSOL Intelligent Thermal-Fluid Simulation Software Product and Services
 - 9.3.4 COMSOL Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)
 - 9.3.5 COMSOL Recent Developments/Updates
 - 9.3.6 COMSOL Competitive Strengths & Weaknesses
- 9.4 Flow Science
 - 9.4.1 Flow Science Details
 - 9.4.2 Flow Science Major Business
 - 9.4.3 Flow Science Intelligent Thermal-Fluid Simulation Software Product and Services
 - 9.4.4 Flow Science Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)
 - 9.4.5 Flow Science Recent Developments/Updates
 - 9.4.6 Flow Science Competitive Strengths & Weaknesses
- 9.5 Simerics
 - 9.5.1 Simerics Details
 - 9.5.2 Simerics Major Business
 - 9.5.3 Simerics Intelligent Thermal-Fluid Simulation Software Product and Services
 - 9.5.4 Simerics Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Simerics Recent Developments/Updates
 - 9.5.6 Simerics Competitive Strengths & Weaknesses
- 9.6 Convergent Science
 - 9.6.1 Convergent Science Details
 - 9.6.2 Convergent Science Major Business
 - 9.6.3 Convergent Science Intelligent Thermal-Fluid Simulation Software Product and Services
 - 9.6.4 Convergent Science Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)
 - 9.6.5 Convergent Science Recent Developments/Updates
 - 9.6.6 Convergent Science Competitive Strengths & Weaknesses
- 9.7 Siemens Digital Industries Software
 - 9.7.1 Siemens Digital Industries Software Details

- 9.7.2 Siemens Digital Industries Software Major Business
- 9.7.3 Siemens Digital Industries Software Intelligent Thermal-Fluid Simulation Software Product and Services
- 9.7.4 Siemens Digital Industries Software Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)
- 9.7.5 Siemens Digital Industries Software Recent Developments/Updates
- 9.7.6 Siemens Digital Industries Software Competitive Strengths & Weaknesses
- 9.8 Dassault Systèmes
 - 9.8.1 Dassault Systèmes Details
 - 9.8.2 Dassault Systèmes Major Business
 - 9.8.3 Dassault Systèmes Intelligent Thermal-Fluid Simulation Software Product and Services
 - 9.8.4 Dassault Systèmes Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)
 - 9.8.5 Dassault Systèmes Recent Developments/Updates
 - 9.8.6 Dassault Systèmes Competitive Strengths & Weaknesses
- 9.9 AVL List
 - 9.9.1 AVL List Details
 - 9.9.2 AVL List Major Business
 - 9.9.3 AVL List Intelligent Thermal-Fluid Simulation Software Product and Services
 - 9.9.4 AVL List Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)
 - 9.9.5 AVL List Recent Developments/Updates
 - 9.9.6 AVL List Competitive Strengths & Weaknesses
- 9.10 ENGYS
 - 9.10.1 ENGYS Details
 - 9.10.2 ENGYS Major Business
 - 9.10.3 ENGYS Intelligent Thermal-Fluid Simulation Software Product and Services
 - 9.10.4 ENGYS Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)
 - 9.10.5 ENGYS Recent Developments/Updates
 - 9.10.6 ENGYS Competitive Strengths & Weaknesses
- 9.11 SimScale
 - 9.11.1 SimScale Details
 - 9.11.2 SimScale Major Business
 - 9.11.3 SimScale Intelligent Thermal-Fluid Simulation Software Product and Services
 - 9.11.4 SimScale Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)
 - 9.11.5 SimScale Recent Developments/Updates

- 9.11.6 SimScale Competitive Strengths & Weaknesses
- 9.12 FIFTY2 Technology
 - 9.12.1 FIFTY2 Technology Details
 - 9.12.2 FIFTY2 Technology Major Business
 - 9.12.3 FIFTY2 Technology Intelligent Thermal-Fluid Simulation Software Product and Services
 - 9.12.4 FIFTY2 Technology Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)
 - 9.12.5 FIFTY2 Technology Recent Developments/Updates
 - 9.12.6 FIFTY2 Technology Competitive Strengths & Weaknesses
- 9.13 Nanjing Tianfu Software
 - 9.13.1 Nanjing Tianfu Software Details
 - 9.13.2 Nanjing Tianfu Software Major Business
 - 9.13.3 Nanjing Tianfu Software Intelligent Thermal-Fluid Simulation Software Product and Services
 - 9.13.4 Nanjing Tianfu Software Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Nanjing Tianfu Software Recent Developments/Updates
 - 9.13.6 Nanjing Tianfu Software Competitive Strengths & Weaknesses
- 9.14 Pera Global
 - 9.14.1 Pera Global Details
 - 9.14.2 Pera Global Major Business
 - 9.14.3 Pera Global Intelligent Thermal-Fluid Simulation Software Product and Services
 - 9.14.4 Pera Global Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Pera Global Recent Developments/Updates
 - 9.14.6 Pera Global Competitive Strengths & Weaknesses
- 9.15 TenFong Technology
 - 9.15.1 TenFong Technology Details
 - 9.15.2 TenFong Technology Major Business
 - 9.15.3 TenFong Technology Intelligent Thermal-Fluid Simulation Software Product and Services
 - 9.15.4 TenFong Technology Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)
 - 9.15.5 TenFong Technology Recent Developments/Updates
 - 9.15.6 TenFong Technology Competitive Strengths & Weaknesses
- 9.16 Beijing YunDao Zhizao Technology
 - 9.16.1 Beijing YunDao Zhizao Technology Details
 - 9.16.2 Beijing YunDao Zhizao Technology Major Business

9.16.3 Beijing YunDao Zhizao Technology Intelligent Thermal-Fluid Simulation Software Product and Services

9.16.4 Beijing YunDao Zhizao Technology Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)

9.16.5 Beijing YunDao Zhizao Technology Recent Developments/Updates

9.16.6 Beijing YunDao Zhizao Technology Competitive Strengths & Weaknesses

9.17 ZWSOFT

9.17.1 ZWSOFT Details

9.17.2 ZWSOFT Major Business

9.17.3 ZWSOFT Intelligent Thermal-Fluid Simulation Software Product and Services

9.17.4 ZWSOFT Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)

9.17.5 ZWSOFT Recent Developments/Updates

9.17.6 ZWSOFT Competitive Strengths & Weaknesses

9.18 Prometech Software

9.18.1 Prometech Software Details

9.18.2 Prometech Software Major Business

9.18.3 Prometech Software Intelligent Thermal-Fluid Simulation Software Product and Services

9.18.4 Prometech Software Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)

9.18.5 Prometech Software Recent Developments/Updates

9.18.6 Prometech Software Competitive Strengths & Weaknesses

9.19 AdvanceSoft

9.19.1 AdvanceSoft Details

9.19.2 AdvanceSoft Major Business

9.19.3 AdvanceSoft Intelligent Thermal-Fluid Simulation Software Product and Services

9.19.4 AdvanceSoft Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)

9.19.5 AdvanceSoft Recent Developments/Updates

9.19.6 AdvanceSoft Competitive Strengths & Weaknesses

9.20 Software Cradle

9.20.1 Software Cradle Details

9.20.2 Software Cradle Major Business

9.20.3 Software Cradle Intelligent Thermal-Fluid Simulation Software Product and Services

9.20.4 Software Cradle Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026)

9.20.5 Software Cradle Recent Developments/Updates

9.20.6 Software Cradle Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Intelligent Thermal-Fluid Simulation Software Industry Chain

10.2 Intelligent Thermal-Fluid Simulation Software Upstream Analysis

10.3 Intelligent Thermal-Fluid Simulation Software Midstream Analysis

10.4 Intelligent Thermal-Fluid Simulation Software Downstream Analysis

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 Intelligent Thermal-Fluid Simulation Software Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Table 2. World Intelligent Thermal-Fluid Simulation Software Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)

Table 3. World Intelligent Thermal-Fluid Simulation Software Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)

Table 4. World Intelligent Thermal-Fluid Simulation Software Revenue Market Share by Region (2021-2026), (by Headquarter Location)

Table 5. World Intelligent Thermal-Fluid Simulation Software Revenue Market Share by Region (2027-2032), (by Headquarter Location)

Table 6. Major Market Trends

Table 7. World Intelligent Thermal-Fluid Simulation Software Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)

Table 8. World Intelligent Thermal-Fluid Simulation Software Consumption Value by Region (2021-2026) & (USD Million)

Table 9. World Intelligent Thermal-Fluid Simulation Software Consumption Value Forecast by Region (2027-2032) & (USD Million)

Table 10. World Intelligent Thermal-Fluid Simulation Software Revenue by Player (2021-2026) & (USD Million)

Table 11. Revenue Market Share of Key Intelligent Thermal-Fluid Simulation Software Players in 2025

Table 12. World Intelligent Thermal-Fluid Simulation Software Industry Rank of Major Player, Based on Revenue in 2025

Table 13. Global Intelligent Thermal-Fluid Simulation Software Company Evaluation Quadrant

Table 14. Head Office of Key Intelligent Thermal-Fluid Simulation Software Players

Table 15. Intelligent Thermal-Fluid Simulation Software Market: Company Product Type Footprint

Table 16. Intelligent Thermal-Fluid Simulation Software Market: Company Product Application Footprint

Table 17. Intelligent Thermal-Fluid Simulation Software Mergers & Acquisitions Activity

Table 18. United States VS China Intelligent Thermal-Fluid Simulation Software Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 19. United States VS China Intelligent Thermal-Fluid Simulation Software Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 20. United States Based Intelligent Thermal-Fluid Simulation Software Companies, Headquarters (States, Country)	
Table 21. United States Based Companies Intelligent Thermal-Fluid Simulation Software Revenue, (2021-2026) & (USD Million)	
Table 22. United States Based Companies Intelligent Thermal-Fluid Simulation Software Revenue Market Share (2021-2026)	
Table 23. China Based Intelligent Thermal-Fluid Simulation Software Companies, Headquarters (Province, Country)	
Table 24. China Based Companies Intelligent Thermal-Fluid Simulation Software Revenue, (2021-2026) & (USD Million)	
Table 25. China Based Companies Intelligent Thermal-Fluid Simulation Software Revenue Market Share (2021-2026)	
Table 26. Rest of World Based Intelligent Thermal-Fluid Simulation Software Companies, Headquarters (Province, Country)	
Table 27. Rest of World Based Companies Intelligent Thermal-Fluid Simulation Software Revenue (2021-2026) & (USD Million)	
Table 28. Rest of World Based Companies Intelligent Thermal-Fluid Simulation Software Revenue Market Share (2021-2026)	
Table 29. World Intelligent Thermal-Fluid Simulation Software Market Size by Type, (USD Million), 2021 & 2025 & 2032	
Table 30. World Intelligent Thermal-Fluid Simulation Software Market Size Value by Type (2021-2026) & (USD Million)	
Table 31. World Intelligent Thermal-Fluid Simulation Software Market Size by Type (2027-2032) & (USD Million)	
Table 32. World Intelligent Thermal-Fluid Simulation Software Market Size by Real-Time Capability, (USD Million), 2021 & 2025 & 2032	
Table 33. World Intelligent Thermal-Fluid Simulation Software Market Size Value by Real-Time Capability (2021-2026) & (USD Million)	
Table 34. World Intelligent Thermal-Fluid Simulation Software Market Size by Real-Time Capability (2027-2032) & (USD Million)	
Table 35. World Intelligent Thermal-Fluid Simulation Software Market Size by Precision, (USD Million), 2021 & 2025 & 2032	
Table 36. World Intelligent Thermal-Fluid Simulation Software Market Size Value by Precision (2021-2026) & (USD Million)	
Table 37. World Intelligent Thermal-Fluid Simulation Software Market Size by Precision (2027-2032) & (USD Million)	
Table 38. World Intelligent Thermal-Fluid Simulation Software Market Size by Application, (USD Million), 2021 & 2025 & 2032	
Table 39. World Intelligent Thermal-Fluid Simulation Software Market Size by	

Application (2021-2026) & (USD Million)

Table 40. World Intelligent Thermal-Fluid Simulation Software Market Size by Application (2027-2032) & (USD Million)

Table 41. Synopsys Basic Information, Manufacturing Base and Competitors

Table 42. Synopsys Major Business

Table 43. Synopsys Intelligent Thermal-Fluid Simulation Software Product and Services

Table 44. Synopsys Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 45. Synopsys Recent Developments/Updates

Table 46. Synopsys Competitive Strengths & Weaknesses

Table 47. Cadence Design Systems Basic Information, Manufacturing Base and Competitors

Table 48. Cadence Design Systems Major Business

Table 49. Cadence Design Systems Intelligent Thermal-Fluid Simulation Software Product and Services

Table 50. Cadence Design Systems Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 51. Cadence Design Systems Recent Developments/Updates

Table 52. Cadence Design Systems Competitive Strengths & Weaknesses

Table 53. COMSOL Basic Information, Manufacturing Base and Competitors

Table 54. COMSOL Major Business

Table 55. COMSOL Intelligent Thermal-Fluid Simulation Software Product and Services

Table 56. COMSOL Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 57. COMSOL Recent Developments/Updates

Table 58. COMSOL Competitive Strengths & Weaknesses

Table 59. Flow Science Basic Information, Manufacturing Base and Competitors

Table 60. Flow Science Major Business

Table 61. Flow Science Intelligent Thermal-Fluid Simulation Software Product and Services

Table 62. Flow Science Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 63. Flow Science Recent Developments/Updates

Table 64. Flow Science Competitive Strengths & Weaknesses

Table 65. Simerics Basic Information, Manufacturing Base and Competitors

Table 66. Simerics Major Business

Table 67. Simerics Intelligent Thermal-Fluid Simulation Software Product and Services

Table 68. Simerics Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 69. Simerics Recent Developments/Updates
Table 70. Simerics Competitive Strengths & Weaknesses
Table 71. Convergent Science Basic Information, Manufacturing Base and Competitors
Table 72. Convergent Science Major Business
Table 73. Convergent Science Intelligent Thermal-Fluid Simulation Software Product and Services
Table 74. Convergent Science Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 75. Convergent Science Recent Developments/Updates
Table 76. Convergent Science Competitive Strengths & Weaknesses
Table 77. Siemens Digital Industries Software Basic Information, Manufacturing Base and Competitors
Table 78. Siemens Digital Industries Software Major Business
Table 79. Siemens Digital Industries Software Intelligent Thermal-Fluid Simulation Software Product and Services
Table 80. Siemens Digital Industries Software Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 81. Siemens Digital Industries Software Recent Developments/Updates
Table 82. Siemens Digital Industries Software Competitive Strengths & Weaknesses
Table 83. Dassault Systèmes Basic Information, Manufacturing Base and Competitors
Table 84. Dassault Systèmes Major Business
Table 85. Dassault Systèmes Intelligent Thermal-Fluid Simulation Software Product and Services
Table 86. Dassault Systèmes Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 87. Dassault Systèmes Recent Developments/Updates
Table 88. Dassault Systèmes Competitive Strengths & Weaknesses
Table 89. AVL List Basic Information, Manufacturing Base and Competitors
Table 90. AVL List Major Business
Table 91. AVL List Intelligent Thermal-Fluid Simulation Software Product and Services
Table 92. AVL List Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 93. AVL List Recent Developments/Updates
Table 94. AVL List Competitive Strengths & Weaknesses
Table 95. ENGYS Basic Information, Manufacturing Base and Competitors
Table 96. ENGYS Major Business
Table 97. ENGYS Intelligent Thermal-Fluid Simulation Software Product and Services
Table 98. ENGYS Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 99. ENGYS Recent Developments/Updates
Table 100. ENGYS Competitive Strengths & Weaknesses
Table 101. SimScale Basic Information, Manufacturing Base and Competitors
Table 102. SimScale Major Business
Table 103. SimScale Intelligent Thermal-Fluid Simulation Software Product and Services
Table 104. SimScale Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 105. SimScale Recent Developments/Updates
Table 106. SimScale Competitive Strengths & Weaknesses
Table 107. FIFTY2 Technology Basic Information, Manufacturing Base and Competitors
Table 108. FIFTY2 Technology Major Business
Table 109. FIFTY2 Technology Intelligent Thermal-Fluid Simulation Software Product and Services
Table 110. FIFTY2 Technology Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 111. FIFTY2 Technology Recent Developments/Updates
Table 112. FIFTY2 Technology Competitive Strengths & Weaknesses
Table 113. Nanjing Tianfu Software Basic Information, Manufacturing Base and Competitors
Table 114. Nanjing Tianfu Software Major Business
Table 115. Nanjing Tianfu Software Intelligent Thermal-Fluid Simulation Software Product and Services
Table 116. Nanjing Tianfu Software Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 117. Nanjing Tianfu Software Recent Developments/Updates
Table 118. Nanjing Tianfu Software Competitive Strengths & Weaknesses
Table 119. Pera Global Basic Information, Manufacturing Base and Competitors
Table 120. Pera Global Major Business
Table 121. Pera Global Intelligent Thermal-Fluid Simulation Software Product and Services
Table 122. Pera Global Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 123. Pera Global Recent Developments/Updates
Table 124. Pera Global Competitive Strengths & Weaknesses
Table 125. TenFong Technology Basic Information, Manufacturing Base and Competitors
Table 126. TenFong Technology Major Business
Table 127. TenFong Technology Intelligent Thermal-Fluid Simulation Software Product

and Services

Table 128. TenFong Technology Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 129. TenFong Technology Recent Developments/Updates

Table 130. TenFong Technology Competitive Strengths & Weaknesses

Table 131. Beijing YunDao Zhizao Technology Basic Information, Manufacturing Base and Competitors

Table 132. Beijing YunDao Zhizao Technology Major Business

Table 133. Beijing YunDao Zhizao Technology Intelligent Thermal-Fluid Simulation Software Product and Services

Table 134. Beijing YunDao Zhizao Technology Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 135. Beijing YunDao Zhizao Technology Recent Developments/Updates

Table 136. Beijing YunDao Zhizao Technology Competitive Strengths & Weaknesses

Table 137. ZWSOFT Basic Information, Manufacturing Base and Competitors

Table 138. ZWSOFT Major Business

Table 139. ZWSOFT Intelligent Thermal-Fluid Simulation Software Product and Services

Table 140. ZWSOFT Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 141. ZWSOFT Recent Developments/Updates

Table 142. ZWSOFT Competitive Strengths & Weaknesses

Table 143. Prometech Software Basic Information, Manufacturing Base and Competitors

Table 144. Prometech Software Major Business

Table 145. Prometech Software Intelligent Thermal-Fluid Simulation Software Product and Services

Table 146. Prometech Software Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 147. Prometech Software Recent Developments/Updates

Table 148. Prometech Software Competitive Strengths & Weaknesses

Table 149. AdvanceSoft Basic Information, Manufacturing Base and Competitors

Table 150. AdvanceSoft Major Business

Table 151. AdvanceSoft Intelligent Thermal-Fluid Simulation Software Product and Services

Table 152. AdvanceSoft Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 153. AdvanceSoft Recent Developments/Updates

Table 154. AdvanceSoft Competitive Strengths & Weaknesses

Table 155. Software Cradle Basic Information, Manufacturing Base and Competitors

Table 156. Software Cradle Major Business

Table 157. Software Cradle Intelligent Thermal-Fluid Simulation Software Product and Services

Table 158. Software Cradle Intelligent Thermal-Fluid Simulation Software Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 159. Software Cradle Recent Developments/Updates

Table 160. Software Cradle Competitive Strengths & Weaknesses

Table 161. Global Key Players of Intelligent Thermal-Fluid Simulation Software Upstream (Raw Materials)

Table 162. Global Intelligent Thermal-Fluid Simulation Software Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Intelligent Thermal-Fluid Simulation Software Picture

Figure 2. World Intelligent Thermal-Fluid Simulation Software Total Revenue: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Intelligent Thermal-Fluid Simulation Software Total Revenue (2021-2032) & (USD Million)

Figure 4. World Intelligent Thermal-Fluid Simulation Software Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Figure 5. World Intelligent Thermal-Fluid Simulation Software Revenue Market Share by Region (2021-2032), (by Headquarter Location)

Figure 6. United States Based Company Intelligent Thermal-Fluid Simulation Software Revenue (2021-2032) & (USD Million)

Figure 7. China Based Company Intelligent Thermal-Fluid Simulation Software Revenue (2021-2032) & (USD Million)

Figure 8. Europe Based Company Intelligent Thermal-Fluid Simulation Software Revenue (2021-2032) & (USD Million)

Figure 9. Japan Based Company Intelligent Thermal-Fluid Simulation Software Revenue (2021-2032) & (USD Million)

Figure 10. South Korea Based Company Intelligent Thermal-Fluid Simulation Software Revenue (2021-2032) & (USD Million)

Figure 11. ASEAN Based Company Intelligent Thermal-Fluid Simulation Software Revenue (2021-2032) & (USD Million)

Figure 12. India Based Company Intelligent Thermal-Fluid Simulation Software Revenue (2021-2032) & (USD Million)

Figure 13. Intelligent Thermal-Fluid Simulation Software Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Intelligent Thermal-Fluid Simulation Software Consumption Value (2021-2032) & (USD Million)

Figure 16. World Intelligent Thermal-Fluid Simulation Software Consumption Value Market Share by Region (2021-2032)

Figure 17. United States Intelligent Thermal-Fluid Simulation Software Consumption Value (2021-2032) & (USD Million)

Figure 18. China Intelligent Thermal-Fluid Simulation Software Consumption Value (2021-2032) & (USD Million)

Figure 19. Europe Intelligent Thermal-Fluid Simulation Software Consumption Value (2021-2032) & (USD Million)

Figure 20. Japan Intelligent Thermal-Fluid Simulation Software Consumption Value (2021-2032) & (USD Million)

Figure 21. South Korea Intelligent Thermal-Fluid Simulation Software Consumption Value (2021-2032) & (USD Million)

Figure 22. ASEAN Intelligent Thermal-Fluid Simulation Software Consumption Value (2021-2032) & (USD Million)

Figure 23. India Intelligent Thermal-Fluid Simulation Software Consumption Value (2021-2032) & (USD Million)

Figure 24. Producer Shipments of Intelligent Thermal-Fluid Simulation Software by Player Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Intelligent Thermal-Fluid Simulation Software Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Intelligent Thermal-Fluid Simulation Software Markets in 2025

Figure 27. United States VS China: Intelligent Thermal-Fluid Simulation Software Revenue Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Intelligent Thermal-Fluid Simulation Software Consumption Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. World Intelligent Thermal-Fluid Simulation Software Market Size by Type, (USD Million), 2021 & 2025 & 2032

Figure 30. World Intelligent Thermal-Fluid Simulation Software Market Size Market Share by Type in 2025

Figure 31. Single-Physics Type (1 Physical Field)

Figure 32. Dual-Physics Coupling Type (2 Physical Fields)

Figure 33. Multi-Physics Coupling Type (3–4 Physical Fields)

Figure 34. Highly Multi-Physics Type (?5 Physical Fields)

Figure 35. World Intelligent Thermal-Fluid Simulation Software Market Size Market Share by Type (2021-2032)

Figure 36. World Intelligent Thermal-Fluid Simulation Software Market Size by Real-Time Capability, (USD Million), 2021 & 2025 & 2032

Figure 37. World Intelligent Thermal-Fluid Simulation Software Market Size Market Share by Real-Time Capability in 2025

Figure 38. Offline High-Precision Simulation

Figure 39. Rapid Simulation

Figure 40. Near-Real-Time Simulation

Figure 41. Real-Time Simulation

Figure 42. World Intelligent Thermal-Fluid Simulation Software Market Size Market Share by Real-Time Capability (2021-2032)

Figure 43. World Intelligent Thermal-Fluid Simulation Software Market Size by

Precision, (USD Million), 2021 & 2025 & 2032

Figure 44. World Intelligent Thermal-Fluid Simulation Software Market Size Market Share by Precision in 2025

Figure 45. Standard Precision

Figure 46. High Engineering Precision

Figure 47. World Intelligent Thermal-Fluid Simulation Software Market Size Market Share by Precision (2021-2032)

Figure 48. World Intelligent Thermal-Fluid Simulation Software Market Size by Application, (USD Million), 2021 & 2025 & 2032

Figure 49. World Intelligent Thermal-Fluid Simulation Software Market Size Market Share by Application in 2025

Figure 50. Automotive

Figure 51. Aerospace & Defense

Figure 52. Energy

Figure 53. Electronics & Semiconductors

Figure 54. Industrial

Figure 55. Others

Figure 56. World Intelligent Thermal-Fluid Simulation Software Market Size Market Share by Application (2021-2032)

Figure 57. Intelligent Thermal-Fluid Simulation Software Industrial Chain

Figure 58. Methodology

Figure 59. Research Process and Data Source

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