

Global Liquid Cooling Machine Tools Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/GA6C0B16EA68EN.html>

Date: September 2026

Pages: 113

Price: US\$ 3,480.00 (Single User License)

ID: GA6C0B16EA68EN

Abstracts

According to our (Global Info Research) latest study, the global Liquid Cooling Machine Tools market size was valued at US\$ 1340 million in 2025 and is forecast to a readjusted size of US\$ 2577 million by 2032 with a CAGR of 9.8% during review period.

Liquid Cooling Machine Tools refer to the comprehensive category of high-precision metal-cutting machine tools specifically engineered for the manufacturing of core metallic components used in liquid cooling thermal management systems. The core manufacturing process revolves around precision CNC machining, encompassing milling, drilling, and turning operations performed on materials such as copper, aluminum, and stainless steel to produce critical components including cold plates, quick disconnect couplings (UQD), manifolds, distributors, and valve bodies. These machine tools are required to deliver micron-level machining accuracy, ensuring the single-pass formation of complex flow channels and sealing surfaces, while simultaneously maintaining high rigidity and efficiency for thin-wall workpiece processing. The equipment category primarily includes Vertical Machining Centers (VMC) and Horizontal Machining Centers (HMC), with manufacturing approaches spanning subtractive manufacturing as the dominant technology and additive manufacturing emerging as a complementary process route. This product category has emerged as a specialized precision manufacturing equipment segment driven by the high-power thermal dissipation requirements of AI computing infrastructure.

Key Findings

Global liquid cooling machine tools production reached approximately 32,000

units in 2025

The average global market price for liquid cooling machine tools stood at US\$40,000 per unit in 2025

Global production capacity for liquid cooling machine tools totaled 40,000 units in 2025

The industry achieved an average gross margin of 38% in 2025

Asia-Pacific represents the largest regional market, driven by concentrated AI infrastructure investment

Market Trends

The liquid cooling machine tools industry is undergoing a significant transformation driven by the explosive growth of AI computing power and the corresponding surge in high-density thermal management requirements. Machine tool manufacturers are increasingly developing dedicated machining solutions tailored specifically for liquid cooling component production, with Mazak's MTF2026 exhibition showcasing dedicated machining solutions for AI liquid cooling connectors, semiconductor vacuum chambers, and humanoid robot components. The industry is witnessing a shift toward integrated multi-tasking machines capable of completing turning, drilling, milling, and tapping operations in a single setup, eliminating positioning errors caused by multiple clampings. High-speed and high-rigidity vertical machining centers are being deployed for complex liquid-cooling connector cavity machining, with optional 5-axis rotary tables enabling the processing of complex curved surfaces. The trend toward automated, unmanned production is accelerating, with manufacturers incorporating robotics and flexible manufacturing systems to meet the industry's requirements for high product variety and rapid iteration cycles.

Market Dynamics

Drivers

The primary growth driver for the liquid cooling machine tools market is the relentless expansion of AI data center infrastructure and the corresponding escalation in power

density per server rack. As AI server single-rack power consumption continues to rise, the imperative for liquid cooling solutions has intensified, driving demand for precision-machined components including cold plates, manifolds, pumps, and quick disconnect couplings. The liquid cooling components market in China alone reached RMB 15.98 billion in 2025, representing 45.2% year-on-year growth. Machine tool orders in liquid cooling applications have surged, with industry reports indicating that demand for high-speed tapping centers and vertical machining centers for the production of liquid-cooled core structural components remains at elevated levels. The low penetration rate of liquid cooling-specific machine tools relative to total industry demand—estimated at less than 2% in 2025 with projections exceeding 10% in 2026—signals substantial runway for continued growth.

Restraints

The industry faces several constraints that temper growth. The supply chain for critical components such as ball screws and linear guides remains heavily dependent on Japanese imports, with delivery lead times extending to three months, constraining short-term production capacity and cost structures. The high precision requirements for liquid cooling components demand advanced machine tool capabilities that are not yet universally available across all manufacturing regions. The relatively nascent stage of the liquid cooling market means that equipment demand remains subject to the capacity planning cycles of downstream server manufacturers and the commercialization timelines of liquid cooling solutions. Additionally, the specialization required for liquid cooling component manufacturing creates a barrier to entry for general-purpose machine tool manufacturers without dedicated R&D investment in this application area.

Opportunities

Significant opportunities exist for machine tool manufacturers that can develop dedicated, application-specific solutions for liquid cooling component production. The emergence of new component geometries—including eccentric holes, side details, and corner structures in liquid-cooling connectors—creates demand for specialized machining capabilities that traditional lathes cannot address. The compound annual growth rate of 49% projected for AI server liquid cooling-related revenue at certain precision machine tool manufacturers through fiscal 2026-2029 underscores the growth potential. Opportunities also exist in the development of hybrid manufacturing approaches combining subtractive and additive manufacturing techniques, as well as in the integration of automation and robotics for high-volume production. The semiconductor equipment and humanoid robotics sectors represent adjacent markets

with similar precision machining requirements.

Challenges

The liquid cooling machine tools industry faces notable risks and challenges. Rapid technological evolution in both liquid cooling system design and machining processes requires continuous R&D investment and frequent product updates, creating obsolescence risk for existing equipment. The concentration of advanced machine tool manufacturing capabilities in certain geography regions—particularly Japan and Germany—creates supply chain vulnerabilities. Intensifying competition among machine tool manufacturers entering the liquid cooling space may pressure pricing and margins despite the current industry-average gross margin of 38%. The cyclical nature of capital equipment investment means that any slowdown in AI infrastructure spending could disproportionately impact this specialized segment. Additionally, the need for specialized training and technical support for end users adds to the total cost of ownership and may slow adoption rates among smaller manufacturers.

Industry Chain Analysis

The liquid cooling machine tools industry chain consists of three distinct tiers. The upstream segment encompasses raw material suppliers providing high-grade cast iron, steel, and aluminum for machine tool structures, as well as manufacturers of critical components including spindles, linear guides, ball screws, CNC controllers, and servo motors. The midstream segment consists of the machine tool manufacturers—the primary subject of this report—who integrate these components into complete machining centers specifically configured for liquid cooling production. Key players in this segment include global component leaders such as Yamazaki Mazak, DMG MORI, Haas Automation, Okuma, and Tsugami, alongside Chinese manufacturers including Guangzhou Haozhi Industrial, Jirfine Intelligent Equipment, and General Technology Group. The downstream segment encompasses end users in the liquid cooling component manufacturing industry, including producers of cold plates, quick connectors, manifolds, distributors, and valve bodies, who ultimately supply to data center operators, server manufacturers, and thermal management solution providers. Value creation within this chain is concentrated in the midstream segment, where machine tool manufacturers capture value through precision engineering, application-specific customization, and after-sales service and support.

Report Scope

This report is a detailed and comprehensive analysis for global Liquid Cooling Machine Tools market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Liquid Cooling Machine Tools market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Liquid Cooling Machine Tools market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Liquid Cooling Machine Tools market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Liquid Cooling Machine Tools market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Liquid Cooling Machine Tools

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Liquid Cooling Machine Tools market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Guangzhou Haozhi Industrial Co.,Ltd, Jirfine Intelligent Equipment Co.,Ltd, China General Technology (Group) Holding Co., Ltd., Haas Automation?, Mazak USA?, DMG MORI USA?, Okuma America?, Tsugami Corporation, Star Micronics, Yamazaki Mazak, etc.

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

Liquid Cooling Machine Tools market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

Market segment by Type

Vertical Machining Center

Horizontal Machining Center

Market segment by Technical Approaches

Subtractive Manufacturing

Additive Manufacturing

Market segment by Application

Liquid Cooling Plate

Distributor

Quick Connector

Manifold

Valve Body

Others

Major players covered

Guangzhou Haozhi Industrial Co.,Ltd

Jirfine Intelligent Equipment Co.,Ltd

China General Technology (Group) Holding Co., Ltd.

Haas Automation?

Mazak USA?

DMG MORI USA?

Okuma America?

Tsugami Corporation

Star Micronics

Yamazaki Mazak

EMCO

SW GmbH

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Liquid Cooling Machine Tools product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Liquid Cooling Machine Tools, with price, sales quantity, revenue, and global market share of Liquid Cooling Machine Tools from 2021 to 2026.

Chapter 3, the Liquid Cooling Machine Tools competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Liquid Cooling Machine Tools breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Liquid Cooling Machine Tools market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Liquid Cooling Machine Tools.

Chapter 14 and 15, to describe Liquid Cooling Machine Tools sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Type

1.3.1 Overview: Global Liquid Cooling Machine Tools Consumption Value by Type: 2021 Versus 2025 Versus 2032

1.3.2 Vertical Machining Center

1.3.3 Horizontal Machining Center

1.4 Market Analysis by Technical Approaches

1.4.1 Overview: Global Liquid Cooling Machine Tools Consumption Value by Technical Approaches: 2021 Versus 2025 Versus 2032

1.4.2 Subtractive Manufacturing

1.4.3 Additive Manufacturing

1.5 Market Analysis by Application

1.5.1 Overview: Global Liquid Cooling Machine Tools Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.5.2 Liquid Cooling Plate

1.5.3 Distributor

1.5.4 Quick Connector

1.5.5 Manifold

1.5.6 Valve Body

1.5.7 Others

1.6 Global Liquid Cooling Machine Tools Market Size & Forecast

1.6.1 Global Liquid Cooling Machine Tools Consumption Value (2021 & 2025 & 2032)

1.6.2 Global Liquid Cooling Machine Tools Sales Quantity (2021-2032)

1.6.3 Global Liquid Cooling Machine Tools Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 Guangzhou Haozhi Industrial Co.,Ltd

2.1.1 Guangzhou Haozhi Industrial Co.,Ltd Details

2.1.2 Guangzhou Haozhi Industrial Co.,Ltd Major Business

2.1.3 Guangzhou Haozhi Industrial Co.,Ltd Liquid Cooling Machine Tools Product and Services

2.1.4 Guangzhou Haozhi Industrial Co.,Ltd Liquid Cooling Machine Tools Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

- 2.1.5 Guangzhou Haozhi Industrial Co.,Ltd Recent Developments/Updates
- 2.2 Jirfine Intelligent Equipment Co.,Ltd
 - 2.2.1 Jirfine Intelligent Equipment Co.,Ltd Details
 - 2.2.2 Jirfine Intelligent Equipment Co.,Ltd Major Business
 - 2.2.3 Jirfine Intelligent Equipment Co.,Ltd Liquid Cooling Machine Tools Product and Services
 - 2.2.4 Jirfine Intelligent Equipment Co.,Ltd Liquid Cooling Machine Tools Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.2.5 Jirfine Intelligent Equipment Co.,Ltd Recent Developments/Updates
- 2.3 China General Technology (Group) Holding Co., Ltd.
 - 2.3.1 China General Technology (Group) Holding Co., Ltd. Details
 - 2.3.2 China General Technology (Group) Holding Co., Ltd. Major Business
 - 2.3.3 China General Technology (Group) Holding Co., Ltd. Liquid Cooling Machine Tools Product and Services
 - 2.3.4 China General Technology (Group) Holding Co., Ltd. Liquid Cooling Machine Tools Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.3.5 China General Technology (Group) Holding Co., Ltd. Recent Developments/Updates
- 2.4 Haas Automation?
 - 2.4.1 Haas Automation? Details
 - 2.4.2 Haas Automation? Major Business
 - 2.4.3 Haas Automation? Liquid Cooling Machine Tools Product and Services
 - 2.4.4 Haas Automation? Liquid Cooling Machine Tools Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.4.5 Haas Automation? Recent Developments/Updates
- 2.5 Mazak USA?
 - 2.5.1 Mazak USA? Details
 - 2.5.2 Mazak USA? Major Business
 - 2.5.3 Mazak USA? Liquid Cooling Machine Tools Product and Services
 - 2.5.4 Mazak USA? Liquid Cooling Machine Tools Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.5.5 Mazak USA? Recent Developments/Updates
- 2.6 DMG MORI USA?
 - 2.6.1 DMG MORI USA? Details
 - 2.6.2 DMG MORI USA? Major Business
 - 2.6.3 DMG MORI USA? Liquid Cooling Machine Tools Product and Services
 - 2.6.4 DMG MORI USA? Liquid Cooling Machine Tools Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

- 2.6.5 DMG MORI USA? Recent Developments/Updates
- 2.7 Okuma America?
 - 2.7.1 Okuma America? Details
 - 2.7.2 Okuma America? Major Business
 - 2.7.3 Okuma America? Liquid Cooling Machine Tools Product and Services
 - 2.7.4 Okuma America? Liquid Cooling Machine Tools Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.7.5 Okuma America? Recent Developments/Updates
- 2.8 Tsugami Corporation
 - 2.8.1 Tsugami Corporation Details
 - 2.8.2 Tsugami Corporation Major Business
 - 2.8.3 Tsugami Corporation Liquid Cooling Machine Tools Product and Services
 - 2.8.4 Tsugami Corporation Liquid Cooling Machine Tools Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.8.5 Tsugami Corporation Recent Developments/Updates
- 2.9 Star Micronics
 - 2.9.1 Star Micronics Details
 - 2.9.2 Star Micronics Major Business
 - 2.9.3 Star Micronics Liquid Cooling Machine Tools Product and Services
 - 2.9.4 Star Micronics Liquid Cooling Machine Tools Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.9.5 Star Micronics Recent Developments/Updates
- 2.10 Yamazaki Mazak
 - 2.10.1 Yamazaki Mazak Details
 - 2.10.2 Yamazaki Mazak Major Business
 - 2.10.3 Yamazaki Mazak Liquid Cooling Machine Tools Product and Services
 - 2.10.4 Yamazaki Mazak Liquid Cooling Machine Tools Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.10.5 Yamazaki Mazak Recent Developments/Updates
- 2.11 EMCO
 - 2.11.1 EMCO Details
 - 2.11.2 EMCO Major Business
 - 2.11.3 EMCO Liquid Cooling Machine Tools Product and Services
 - 2.11.4 EMCO Liquid Cooling Machine Tools Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.11.5 EMCO Recent Developments/Updates
- 2.12 SW GmbH
 - 2.12.1 SW GmbH Details
 - 2.12.2 SW GmbH Major Business

- 2.12.3 SW GmbH Liquid Cooling Machine Tools Product and Services
- 2.12.4 SW GmbH Liquid Cooling Machine Tools Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.12.5 SW GmbH Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: LIQUID COOLING MACHINE TOOLS BY MANUFACTURER

- 3.1 Global Liquid Cooling Machine Tools Sales Quantity by Manufacturer (2021-2026)
- 3.2 Global Liquid Cooling Machine Tools Revenue by Manufacturer (2021-2026)
- 3.3 Global Liquid Cooling Machine Tools Average Price by Manufacturer (2021-2026)
- 3.4 Market Share Analysis (2025)
 - 3.4.1 Producer Shipments of Liquid Cooling Machine Tools by Manufacturer Revenue (\$MM) and Market Share (%): 2025
 - 3.4.2 Top 3 Liquid Cooling Machine Tools Manufacturer Market Share in 2025
 - 3.4.3 Top 6 Liquid Cooling Machine Tools Manufacturer Market Share in 2025
- 3.5 Liquid Cooling Machine Tools Market: Overall Company Footprint Analysis
 - 3.5.1 Liquid Cooling Machine Tools Market: Region Footprint
 - 3.5.2 Liquid Cooling Machine Tools Market: Company Product Type Footprint
 - 3.5.3 Liquid Cooling Machine Tools Market: Company Product Application Footprint
- 3.6 New Market Entrants and Barriers to Market Entry
- 3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

- 4.1 Global Liquid Cooling Machine Tools Market Size by Region
 - 4.1.1 Global Liquid Cooling Machine Tools Sales Quantity by Region (2021-2032)
 - 4.1.2 Global Liquid Cooling Machine Tools Consumption Value by Region (2021-2032)
 - 4.1.3 Global Liquid Cooling Machine Tools Average Price by Region (2021-2032)
- 4.2 North America Liquid Cooling Machine Tools Consumption Value (2021-2032)
- 4.3 Europe Liquid Cooling Machine Tools Consumption Value (2021-2032)
- 4.4 Asia-Pacific Liquid Cooling Machine Tools Consumption Value (2021-2032)
- 4.5 South America Liquid Cooling Machine Tools Consumption Value (2021-2032)
- 4.6 Middle East & Africa Liquid Cooling Machine Tools Consumption Value (2021-2032)

5 MARKET SEGMENT BY TYPE

- 5.1 Global Liquid Cooling Machine Tools Sales Quantity by Type (2021-2032)
- 5.2 Global Liquid Cooling Machine Tools Consumption Value by Type (2021-2032)

5.3 Global Liquid Cooling Machine Tools Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global Liquid Cooling Machine Tools Sales Quantity by Application (2021-2032)

6.2 Global Liquid Cooling Machine Tools Consumption Value by Application (2021-2032)

6.3 Global Liquid Cooling Machine Tools Average Price by Application (2021-2032)

7 NORTH AMERICA

7.1 North America Liquid Cooling Machine Tools Sales Quantity by Type (2021-2032)

7.2 North America Liquid Cooling Machine Tools Sales Quantity by Application (2021-2032)

7.3 North America Liquid Cooling Machine Tools Market Size by Country

7.3.1 North America Liquid Cooling Machine Tools Sales Quantity by Country (2021-2032)

7.3.2 North America Liquid Cooling Machine Tools Consumption Value by Country (2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe Liquid Cooling Machine Tools Sales Quantity by Type (2021-2032)

8.2 Europe Liquid Cooling Machine Tools Sales Quantity by Application (2021-2032)

8.3 Europe Liquid Cooling Machine Tools Market Size by Country

8.3.1 Europe Liquid Cooling Machine Tools Sales Quantity by Country (2021-2032)

8.3.2 Europe Liquid Cooling Machine Tools Consumption Value by Country (2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific Liquid Cooling Machine Tools Sales Quantity by Type (2021-2032)

9.2 Asia-Pacific Liquid Cooling Machine Tools Sales Quantity by Application
(2021-2032)

9.3 Asia-Pacific Liquid Cooling Machine Tools Market Size by Region

9.3.1 Asia-Pacific Liquid Cooling Machine Tools Sales Quantity by Region (2021-2032)

9.3.2 Asia-Pacific Liquid Cooling Machine Tools Consumption Value by Region
(2021-2032)

9.3.3 China Market Size and Forecast (2021-2032)

9.3.4 Japan Market Size and Forecast (2021-2032)

9.3.5 South Korea Market Size and Forecast (2021-2032)

9.3.6 India Market Size and Forecast (2021-2032)

9.3.7 Southeast Asia Market Size and Forecast (2021-2032)

9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

10.1 South America Liquid Cooling Machine Tools Sales Quantity by Type (2021-2032)

10.2 South America Liquid Cooling Machine Tools Sales Quantity by Application
(2021-2032)

10.3 South America Liquid Cooling Machine Tools Market Size by Country

10.3.1 South America Liquid Cooling Machine Tools Sales Quantity by Country
(2021-2032)

10.3.2 South America Liquid Cooling Machine Tools Consumption Value by Country
(2021-2032)

10.3.3 Brazil Market Size and Forecast (2021-2032)

10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

11.1 Middle East & Africa Liquid Cooling Machine Tools Sales Quantity by Type
(2021-2032)

11.2 Middle East & Africa Liquid Cooling Machine Tools Sales Quantity by Application
(2021-2032)

11.3 Middle East & Africa Liquid Cooling Machine Tools Market Size by Country

11.3.1 Middle East & Africa Liquid Cooling Machine Tools Sales Quantity by Country
(2021-2032)

11.3.2 Middle East & Africa Liquid Cooling Machine Tools Consumption Value by
Country (2021-2032)

11.3.3 Turkey Market Size and Forecast (2021-2032)

- 11.3.4 Egypt Market Size and Forecast (2021-2032)
- 11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)
- 11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

- 12.1 Liquid Cooling Machine Tools Market Drivers
- 12.2 Liquid Cooling Machine Tools Market Restraints
- 12.3 Liquid Cooling Machine Tools Trends Analysis
- 12.4 Porters Five Forces Analysis
 - 12.4.1 Threat of New Entrants
 - 12.4.2 Bargaining Power of Suppliers
 - 12.4.3 Bargaining Power of Buyers
 - 12.4.4 Threat of Substitutes
 - 12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

- 13.1 Raw Material of Liquid Cooling Machine Tools and Key Manufacturers
- 13.2 Manufacturing Costs Percentage of Liquid Cooling Machine Tools
- 13.3 Liquid Cooling Machine Tools Production Process
- 13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

- 14.1 Sales Channel
 - 14.1.1 Direct to End-User
 - 14.1.2 Distributors
- 14.2 Liquid Cooling Machine Tools Typical Distributors
- 14.3 Liquid Cooling Machine Tools Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

- 16.1 Methodology
- 16.2 Research Process and Data Source
- 16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global Liquid Cooling Machine Tools Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global Liquid Cooling Machine Tools Consumption Value by Technical Approaches, (USD Million), 2021 & 2025 & 2032

Table 3. Global Liquid Cooling Machine Tools Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 4. Guangzhou Haozhi Industrial Co.,Ltd Basic Information, Manufacturing Base and Competitors

Table 5. Guangzhou Haozhi Industrial Co.,Ltd Major Business

Table 6. Guangzhou Haozhi Industrial Co.,Ltd Liquid Cooling Machine Tools Product and Services

Table 7. Guangzhou Haozhi Industrial Co.,Ltd Liquid Cooling Machine Tools Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 8. Guangzhou Haozhi Industrial Co.,Ltd Recent Developments/Updates

Table 9. Jirfine Intelligent Equipment Co.,Ltd Basic Information, Manufacturing Base and Competitors

Table 10. Jirfine Intelligent Equipment Co.,Ltd Major Business

Table 11. Jirfine Intelligent Equipment Co.,Ltd Liquid Cooling Machine Tools Product and Services

Table 12. Jirfine Intelligent Equipment Co.,Ltd Liquid Cooling Machine Tools Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 13. Jirfine Intelligent Equipment Co.,Ltd Recent Developments/Updates

Table 14. China General Technology (Group) Holding Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 15. China General Technology (Group) Holding Co., Ltd. Major Business

Table 16. China General Technology (Group) Holding Co., Ltd. Liquid Cooling Machine Tools Product and Services

Table 17. China General Technology (Group) Holding Co., Ltd. Liquid Cooling Machine Tools Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 18. China General Technology (Group) Holding Co., Ltd. Recent Developments/Updates

Table 19. Haas Automation? Basic Information, Manufacturing Base and Competitors

Table 20. Haas Automation? Major Business

Table 21. Haas Automation? Liquid Cooling Machine Tools Product and Services

Table 22. Haas Automation? Liquid Cooling Machine Tools Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 23. Haas Automation? Recent Developments/Updates

Table 24. Mazak USA? Basic Information, Manufacturing Base and Competitors

Table 25. Mazak USA? Major Business

Table 26. Mazak USA? Liquid Cooling Machine Tools Product and Services

Table 27. Mazak USA? Liquid Cooling Machine Tools Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 28. Mazak USA? Recent Developments/Updates

Table 29. DMG MORI USA? Basic Information, Manufacturing Base and Competitors

Table 30. DMG MORI USA? Major Business

Table 31. DMG MORI USA? Liquid Cooling Machine Tools Product and Services

Table 32. DMG MORI USA? Liquid Cooling Machine Tools Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 33. DMG MORI USA? Recent Developments/Updates

Table 34. Okuma America? Basic Information, Manufacturing Base and Competitors

Table 35. Okuma America? Major Business

Table 36. Okuma America? Liquid Cooling Machine Tools Product and Services

Table 37. Okuma America? Liquid Cooling Machine Tools Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 38. Okuma America? Recent Developments/Updates

Table 39. Tsugami Corporation Basic Information, Manufacturing Base and Competitors

Table 40. Tsugami Corporation Major Business

Table 41. Tsugami Corporation Liquid Cooling Machine Tools Product and Services

Table 42. Tsugami Corporation Liquid Cooling Machine Tools Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 43. Tsugami Corporation Recent Developments/Updates

Table 44. Star Micronics Basic Information, Manufacturing Base and Competitors

Table 45. Star Micronics Major Business

Table 46. Star Micronics Liquid Cooling Machine Tools Product and Services

Table 47. Star Micronics Liquid Cooling Machine Tools Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 48. Star Micronics Recent Developments/Updates
Table 49. Yamazaki Mazak Basic Information, Manufacturing Base and Competitors
Table 50. Yamazaki Mazak Major Business
Table 51. Yamazaki Mazak Liquid Cooling Machine Tools Product and Services
Table 52. Yamazaki Mazak Liquid Cooling Machine Tools Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 53. Yamazaki Mazak Recent Developments/Updates
Table 54. EMCO Basic Information, Manufacturing Base and Competitors
Table 55. EMCO Major Business
Table 56. EMCO Liquid Cooling Machine Tools Product and Services
Table 57. EMCO Liquid Cooling Machine Tools Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 58. EMCO Recent Developments/Updates
Table 59. SW GmbH Basic Information, Manufacturing Base and Competitors
Table 60. SW GmbH Major Business
Table 61. SW GmbH Liquid Cooling Machine Tools Product and Services
Table 62. SW GmbH Liquid Cooling Machine Tools Sales Quantity (K Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 63. SW GmbH Recent Developments/Updates
Table 64. Global Liquid Cooling Machine Tools Sales Quantity by Manufacturer (2021-2026) & (K Units)
Table 65. Global Liquid Cooling Machine Tools Revenue by Manufacturer (2021-2026) & (USD Million)
Table 66. Global Liquid Cooling Machine Tools Average Price by Manufacturer (2021-2026) & (US\$/Unit)
Table 67. Market Position of Manufacturers in Liquid Cooling Machine Tools, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025
Table 68. Head Office and Liquid Cooling Machine Tools Production Site of Key Manufacturer
Table 69. Liquid Cooling Machine Tools Market: Company Product Type Footprint
Table 70. Liquid Cooling Machine Tools Market: Company Product Application Footprint
Table 71. Liquid Cooling Machine Tools New Market Entrants and Barriers to Market Entry
Table 72. Liquid Cooling Machine Tools Mergers, Acquisition, Agreements, and Collaborations
Table 73. Global Liquid Cooling Machine Tools Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR
Table 74. Global Liquid Cooling Machine Tools Sales Quantity by Region (2021-2026) &

(K Units)

Table 75. Global Liquid Cooling Machine Tools Sales Quantity by Region (2027-2032) & (K Units)

Table 76. Global Liquid Cooling Machine Tools Consumption Value by Region (2021-2026) & (USD Million)

Table 77. Global Liquid Cooling Machine Tools Consumption Value by Region (2027-2032) & (USD Million)

Table 78. Global Liquid Cooling Machine Tools Average Price by Region (2021-2026) & (US\$/Unit)

Table 79. Global Liquid Cooling Machine Tools Average Price by Region (2027-2032) & (US\$/Unit)

Table 80. Global Liquid Cooling Machine Tools Sales Quantity by Type (2021-2026) & (K Units)

Table 81. Global Liquid Cooling Machine Tools Sales Quantity by Type (2027-2032) & (K Units)

Table 82. Global Liquid Cooling Machine Tools Consumption Value by Type (2021-2026) & (USD Million)

Table 83. Global Liquid Cooling Machine Tools Consumption Value by Type (2027-2032) & (USD Million)

Table 84. Global Liquid Cooling Machine Tools Average Price by Type (2021-2026) & (US\$/Unit)

Table 85. Global Liquid Cooling Machine Tools Average Price by Type (2027-2032) & (US\$/Unit)

Table 86. Global Liquid Cooling Machine Tools Sales Quantity by Application (2021-2026) & (K Units)

Table 87. Global Liquid Cooling Machine Tools Sales Quantity by Application (2027-2032) & (K Units)

Table 88. Global Liquid Cooling Machine Tools Consumption Value by Application (2021-2026) & (USD Million)

Table 89. Global Liquid Cooling Machine Tools Consumption Value by Application (2027-2032) & (USD Million)

Table 90. Global Liquid Cooling Machine Tools Average Price by Application (2021-2026) & (US\$/Unit)

Table 91. Global Liquid Cooling Machine Tools Average Price by Application (2027-2032) & (US\$/Unit)

Table 92. North America Liquid Cooling Machine Tools Sales Quantity by Type (2021-2026) & (K Units)

Table 93. North America Liquid Cooling Machine Tools Sales Quantity by Type (2027-2032) & (K Units)

Table 94. North America Liquid Cooling Machine Tools Sales Quantity by Application (2021-2026) & (K Units)

Table 95. North America Liquid Cooling Machine Tools Sales Quantity by Application (2027-2032) & (K Units)

Table 96. North America Liquid Cooling Machine Tools Sales Quantity by Country (2021-2026) & (K Units)

Table 97. North America Liquid Cooling Machine Tools Sales Quantity by Country (2027-2032) & (K Units)

Table 98. North America Liquid Cooling Machine Tools Consumption Value by Country (2021-2026) & (USD Million)

Table 99. North America Liquid Cooling Machine Tools Consumption Value by Country (2027-2032) & (USD Million)

Table 100. Europe Liquid Cooling Machine Tools Sales Quantity by Type (2021-2026) & (K Units)

Table 101. Europe Liquid Cooling Machine Tools Sales Quantity by Type (2027-2032) & (K Units)

Table 102. Europe Liquid Cooling Machine Tools Sales Quantity by Application (2021-2026) & (K Units)

Table 103. Europe Liquid Cooling Machine Tools Sales Quantity by Application (2027-2032) & (K Units)

Table 104. Europe Liquid Cooling Machine Tools Sales Quantity by Country (2021-2026) & (K Units)

Table 105. Europe Liquid Cooling Machine Tools Sales Quantity by Country (2027-2032) & (K Units)

Table 106. Europe Liquid Cooling Machine Tools Consumption Value by Country (2021-2026) & (USD Million)

Table 107. Europe Liquid Cooling Machine Tools Consumption Value by Country (2027-2032) & (USD Million)

Table 108. Asia-Pacific Liquid Cooling Machine Tools Sales Quantity by Type (2021-2026) & (K Units)

Table 109. Asia-Pacific Liquid Cooling Machine Tools Sales Quantity by Type (2027-2032) & (K Units)

Table 110. Asia-Pacific Liquid Cooling Machine Tools Sales Quantity by Application (2021-2026) & (K Units)

Table 111. Asia-Pacific Liquid Cooling Machine Tools Sales Quantity by Application (2027-2032) & (K Units)

Table 112. Asia-Pacific Liquid Cooling Machine Tools Sales Quantity by Region (2021-2026) & (K Units)

Table 113. Asia-Pacific Liquid Cooling Machine Tools Sales Quantity by Region

(2027-2032) & (K Units)

Table 114. Asia-Pacific Liquid Cooling Machine Tools Consumption Value by Region (2021-2026) & (USD Million)

Table 115. Asia-Pacific Liquid Cooling Machine Tools Consumption Value by Region (2027-2032) & (USD Million)

Table 116. South America Liquid Cooling Machine Tools Sales Quantity by Type (2021-2026) & (K Units)

Table 117. South America Liquid Cooling Machine Tools Sales Quantity by Type (2027-2032) & (K Units)

Table 118. South America Liquid Cooling Machine Tools Sales Quantity by Application (2021-2026) & (K Units)

Table 119. South America Liquid Cooling Machine Tools Sales Quantity by Application (2027-2032) & (K Units)

Table 120. South America Liquid Cooling Machine Tools Sales Quantity by Country (2021-2026) & (K Units)

Table 121. South America Liquid Cooling Machine Tools Sales Quantity by Country (2027-2032) & (K Units)

Table 122. South America Liquid Cooling Machine Tools Consumption Value by Country (2021-2026) & (USD Million)

Table 123. South America Liquid Cooling Machine Tools Consumption Value by Country (2027-2032) & (USD Million)

Table 124. Middle East & Africa Liquid Cooling Machine Tools Sales Quantity by Type (2021-2026) & (K Units)

Table 125. Middle East & Africa Liquid Cooling Machine Tools Sales Quantity by Type (2027-2032) & (K Units)

Table 126. Middle East & Africa Liquid Cooling Machine Tools Sales Quantity by Application (2021-2026) & (K Units)

Table 127. Middle East & Africa Liquid Cooling Machine Tools Sales Quantity by Application (2027-2032) & (K Units)

Table 128. Middle East & Africa Liquid Cooling Machine Tools Sales Quantity by Country (2021-2026) & (K Units)

Table 129. Middle East & Africa Liquid Cooling Machine Tools Sales Quantity by Country (2027-2032) & (K Units)

Table 130. Middle East & Africa Liquid Cooling Machine Tools Consumption Value by Country (2021-2026) & (USD Million)

Table 131. Middle East & Africa Liquid Cooling Machine Tools Consumption Value by Country (2027-2032) & (USD Million)

Table 132. Liquid Cooling Machine Tools Raw Material

Table 133. Key Manufacturers of Liquid Cooling Machine Tools Raw Materials

Table 134. Liquid Cooling Machine Tools Typical Distributors

Table 135. Liquid Cooling Machine Tools Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Liquid Cooling Machine Tools Picture

Figure 2. Global Liquid Cooling Machine Tools Revenue by Type, (USD Million), 2021 & 2025 & 2032

Figure 3. Global Liquid Cooling Machine Tools Revenue Market Share by Type in 2025

Figure 4. Vertical Machining Center Examples

Figure 5. Horizontal Machining Center Examples

Figure 6. Global Liquid Cooling Machine Tools Revenue by Technical Approaches, (USD Million), 2021 & 2025 & 2032

Figure 7. Global Liquid Cooling Machine Tools Revenue Market Share by Technical Approaches in 2025

Figure 8. Subtractive Manufacturing Examples

Figure 9. Additive Manufacturing Examples

Figure 10. Global Liquid Cooling Machine Tools Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 11. Global Liquid Cooling Machine Tools Revenue Market Share by Application in 2025

Figure 12. Liquid Cooling Plate Examples

Figure 13. Distributor Examples

Figure 14. Quick Connector Examples

Figure 15. Manifold Examples

Figure 16. Valve Body Examples

Figure 17. Others Examples

Figure 18. Global Liquid Cooling Machine Tools Consumption Value, (USD Million): 2021 & 2025 & 2032

Figure 19. Global Liquid Cooling Machine Tools Consumption Value and Forecast (2021-2032) & (USD Million)

Figure 20. Global Liquid Cooling Machine Tools Sales Quantity (2021-2032) & (K Units)

Figure 21. Global Liquid Cooling Machine Tools Price (2021-2032) & (US\$/Unit)

Figure 22. Global Liquid Cooling Machine Tools Sales Quantity Market Share by Manufacturer in 2025

Figure 23. Global Liquid Cooling Machine Tools Revenue Market Share by Manufacturer in 2025

Figure 24. Producer Shipments of Liquid Cooling Machine Tools by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 25. Top 3 Liquid Cooling Machine Tools Manufacturer (Revenue) Market Share

in 2025

Figure 26. Top 6 Liquid Cooling Machine Tools Manufacturer (Revenue) Market Share in 2025

Figure 27. Global Liquid Cooling Machine Tools Sales Quantity Market Share by Region (2021-2032)

Figure 28. Global Liquid Cooling Machine Tools Consumption Value Market Share by Region (2021-2032)

Figure 29. North America Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 30. Europe Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 31. Asia-Pacific Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 32. South America Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 33. Middle East & Africa Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 34. Global Liquid Cooling Machine Tools Sales Quantity Market Share by Type (2021-2032)

Figure 35. Global Liquid Cooling Machine Tools Consumption Value Market Share by Type (2021-2032)

Figure 36. Global Liquid Cooling Machine Tools Average Price by Type (2021-2032) & (US\$/Unit)

Figure 37. Global Liquid Cooling Machine Tools Sales Quantity Market Share by Application (2021-2032)

Figure 38. Global Liquid Cooling Machine Tools Revenue Market Share by Application (2021-2032)

Figure 39. Global Liquid Cooling Machine Tools Average Price by Application (2021-2032) & (US\$/Unit)

Figure 40. North America Liquid Cooling Machine Tools Sales Quantity Market Share by Type (2021-2032)

Figure 41. North America Liquid Cooling Machine Tools Sales Quantity Market Share by Application (2021-2032)

Figure 42. North America Liquid Cooling Machine Tools Sales Quantity Market Share by Country (2021-2032)

Figure 43. North America Liquid Cooling Machine Tools Consumption Value Market Share by Country (2021-2032)

Figure 44. United States Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 45. Canada Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 46. Mexico Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 47. Europe Liquid Cooling Machine Tools Sales Quantity Market Share by Type (2021-2032)

Figure 48. Europe Liquid Cooling Machine Tools Sales Quantity Market Share by Application (2021-2032)

Figure 49. Europe Liquid Cooling Machine Tools Sales Quantity Market Share by Country (2021-2032)

Figure 50. Europe Liquid Cooling Machine Tools Consumption Value Market Share by Country (2021-2032)

Figure 51. Germany Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 52. France Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 53. United Kingdom Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 54. Russia Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 55. Italy Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 56. Asia-Pacific Liquid Cooling Machine Tools Sales Quantity Market Share by Type (2021-2032)

Figure 57. Asia-Pacific Liquid Cooling Machine Tools Sales Quantity Market Share by Application (2021-2032)

Figure 58. Asia-Pacific Liquid Cooling Machine Tools Sales Quantity Market Share by Region (2021-2032)

Figure 59. Asia-Pacific Liquid Cooling Machine Tools Consumption Value Market Share by Region (2021-2032)

Figure 60. China Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 61. Japan Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 62. South Korea Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 63. India Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 64. Southeast Asia Liquid Cooling Machine Tools Consumption Value

(2021-2032) & (USD Million)

Figure 65. Australia Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 66. South America Liquid Cooling Machine Tools Sales Quantity Market Share by Type (2021-2032)

Figure 67. South America Liquid Cooling Machine Tools Sales Quantity Market Share by Application (2021-2032)

Figure 68. South America Liquid Cooling Machine Tools Sales Quantity Market Share by Country (2021-2032)

Figure 69. South America Liquid Cooling Machine Tools Consumption Value Market Share by Country (2021-2032)

Figure 70. Brazil Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 71. Argentina Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 72. Middle East & Africa Liquid Cooling Machine Tools Sales Quantity Market Share by Type (2021-2032)

Figure 73. Middle East & Africa Liquid Cooling Machine Tools Sales Quantity Market Share by Application (2021-2032)

Figure 74. Middle East & Africa Liquid Cooling Machine Tools Sales Quantity Market Share by Country (2021-2032)

Figure 75. Middle East & Africa Liquid Cooling Machine Tools Consumption Value Market Share by Country (2021-2032)

Figure 76. Turkey Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 77. Egypt Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 78. Saudi Arabia Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 79. South Africa Liquid Cooling Machine Tools Consumption Value (2021-2032) & (USD Million)

Figure 80. Liquid Cooling Machine Tools Market Drivers

Figure 81. Liquid Cooling Machine Tools Market Restraints

Figure 82. Liquid Cooling Machine Tools Market Trends

Figure 83. Porters Five Forces Analysis

Figure 84. Manufacturing Cost Structure Analysis of Liquid Cooling Machine Tools in 2025

Figure 85. Manufacturing Process Analysis of Liquid Cooling Machine Tools

Figure 86. Liquid Cooling Machine Tools Industrial Chain

Figure 87. Sales Channel: Direct to End-User vs Distributors

Figure 88. Direct Channel Pros & Cons

Figure 89. Indirect Channel Pros & Cons

Figure 90. Methodology

Figure 91. Research Process and Data Source

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