

Global PFAS-Free Immersion Cooling Fluid Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global PFAS-Free Immersion Cooling Fluid market size was valued at US\$ 126 million in 2025 and is forecast to a readjusted size of US\$ 547 million by 2032 with a CAGR of 23.3% during review period.

PFAS-free immersion cooling fluids are non-conductive thermal management fluids used in single-phase immersion liquid cooling systems. They are typically based on synthetic hydrocarbons, synthetic esters, natural esters, mineral oils, or silicones and contain no per- or polyfluoroalkyl substances. They come into direct contact with servers, AI accelerator cards, power electronics, or battery modules to remove heat. The product's overall gross margin is approximately 30%.

Demand for PFAS-free immersion cooling fluids is mainly driven by AI servers, high-performance computing, and high-density colocation data centers. As GPU rack power continues to rise, traditional air cooling faces increasing pressure in energy consumption, noise, and space utilization. Single-phase immersion liquid cooling has lower system complexity than two-phase solutions and maintenance practices closer to conventional oil systems, making it a more scalable pathway. Current buyers focus more on low viscosity, high flash point, low volatility, material compatibility, and long-term oxidative stability, leaving limited room for pricing based solely on cooling performance.

From the supply perspective, traditional fluid and specialty chemical companies such as Shell, ExxonMobil, Castrol, TotalEnergies, and Lubrizol are bringing their base oil, synthetic ester, and additive capabilities into data center applications. Companies such as Engineered Fluids, Submer, Oleon, and Perstorp emphasize biodegradability,

renewable sourcing, or system-level validation. PFAS restrictions and the expected exit of 3M-related fluorinated products are creating more pilot opportunities for non-fluorinated single-phase fluids, but large-scale procurement still depends on server warranties, OCP/UL certification, cleaning and maintenance systems, and validation of fluid replacement cycles.

Future growth will mainly come from new AI cluster projects, energy-saving retrofits of existing data centers, high-density deployment in crypto mining sites, and validation of immersion thermal management for batteries and power electronics.

This report is a detailed and comprehensive analysis for global PFAS-Free Immersion Cooling Fluid 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 PFAS-Free Immersion Cooling Fluid market size and forecasts, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global PFAS-Free Immersion Cooling Fluid market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global PFAS-Free Immersion Cooling Fluid market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global PFAS-Free Immersion Cooling Fluid market shares of main players, shipments in revenue (\$ Million), sales quantity (kg), and ASP (US\$/kg), 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 PFAS-Free Immersion Cooling Fluid

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 PFAS-Free Immersion Cooling Fluid 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 Shell, ExxonMobil, Castrol, Engineered Fluids, Submer, Perstorp, Lubrizol, TotalEnergies, Cargill, Oleon, etc.

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

Market Segmentation

PFAS-Free Immersion Cooling Fluid 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 segment by Type

Synthetic Hydrocarbon Fluid

Synthetic Ester Fluid

Natural Ester Fluid

Mineral Oil-Based Fluid

Silicone-Based Fluid

Market segment by Viscosity Grade

Ultra-Low Viscosity Grade

Low Viscosity Grade

Medium Viscosity Grade

High Viscosity Grade

Market segment by System Compatibility

Open-Bath Tank Fluid

Sealed Tank Fluid

Rack or Chassis Immersion Fluid

Battery Pack Immersion Fluid

Edge or Containerized System Fluid

Market segment by Validation Level

Processor Warranty-Eligible Fluid

OCP or UL Certified Fluid

Immersion-System Approved Fluid

General Commercial Fluid

Custom Formulation Fluid

Market segment by Application

Data Center IT Equipment Cooling

Edge and Telecom Equipment Cooling

Power Electronics Cooling

Battery and Energy Storage Cooling

Other Specialty Electronics Cooling

Major players covered

Shell

ExxonMobil

Castrol

Engineered Fluids

Submer

Perstorp

Lubrizol

TotalEnergies

Cargill

Oleon

Fuchs

Dow

Wacker

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)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe PFAS-Free Immersion Cooling Fluid product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of PFAS-Free Immersion Cooling Fluid, with price, sales quantity, revenue, and global market share of PFAS-Free Immersion Cooling Fluid from 2021 to 2026.

Chapter 3, the PFAS-Free Immersion Cooling Fluid competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the PFAS-Free Immersion Cooling Fluid 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 PFAS-Free Immersion Cooling Fluid 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 PFAS-Free Immersion Cooling Fluid.

Chapter 14 and 15, to describe PFAS-Free Immersion Cooling Fluid sales channel, distributors, customers, research findings and conclusion.

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