

Global Phase Change Immersion Cooling System 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 Phase Change Immersion Cooling System market size was valued at US\$ 324 million in 2025 and is forecast to a readjusted size of US\$ 1038 million by 2032 with a CAGR of 17.8% during review period.

Phase Change Immersion Cooling Systems submerge servers, GPU computing nodes, ASIC miners, and other high-power electronic equipment directly in a low-boiling-point dielectric fluid, using fluid evaporation, vapor condensation, and liquid return to achieve efficient heat removal. A complete system generally includes a sealed immersion tank, condenser, secondary cooling loop, fluid recovery unit, monitoring and control system, and external heat-rejection equipment. Major applications include artificial intelligence, high-performance computing, hyperscale data centers, digital asset computing, and edge computing. Key upstream inputs include dielectric fluids, tanks, heat exchangers, pumps, valves, sensors, seals, and controllers, while major downstream customers include cloud service providers, data center operators, AI computing centers, HPC facilities, and research institutions. In 2025, global effective annual production capacity was approximately 2,150 units, sales reached about 1,624 units, the average ex-factory price was around USD 194,000 per unit, and the industry gross margin was approximately 25%-40%.

The global Phase Change Immersion Cooling System market remains at an early stage of commercialization and is smaller than the single-phase immersion and direct-to-chip liquid cooling markets. However, it offers strong heat-removal capability in ultra-high heat-flux environments. By using fluid boiling, vapor condensation, and liquid return, the system can reduce dependence on server fans and conventional air-side cooling

equipment while increasing computing density per unit of floor space. Current demand is concentrated in AI training, high-performance computing, digital asset computing, and selected hyperscale data centers, while conventional enterprise data centers remain focused mainly on pilot and small-scale deployments.

Product development is moving toward sealed, modular, and higher-capacity integrated systems. New-generation solutions place greater emphasis on tank sealing, pressure control, fluid recovery, online maintenance, and parallel operation of multiple tanks. The market is also shifting from standalone immersion tanks toward modular platforms integrating power distribution, condensation, heat rejection, and intelligent monitoring. As the power consumption of GPUs, AI accelerators, and high-performance processors continues to increase, cooling capacity per system is rising. Future competition will focus less on nominal cooling capacity alone and more on temperature uniformity, fluid loss, equipment compatibility, operating reliability, and lifecycle cost.

Market growth is primarily driven by investment in AI infrastructure, high-performance computing centers, and high-density data centers. Compared with conventional air cooling, phase change immersion cooling can reduce cooling-space requirements, lower fan energy consumption, and provide a more stable operating temperature for high-power processors. Systems combined with dry coolers and modular deployment may also offer advantages in hot, water-constrained, or space-limited regions. As server manufacturers introduce immersion-ready platforms and cooling suppliers strengthen joint validation with IT hardware companies, the technology is expected to expand gradually from digital asset computing into AI, cloud computing, and scientific research applications.

The industry still faces challenges related to high fluid costs, stricter environmental requirements, sealing complexity, and immature maintenance practices. Low-boiling dielectric fluids are expensive, and leakage or evaporation losses can materially increase total cost of ownership. Certain fluorinated fluids also face environmental scrutiny and long-term supply uncertainty. In addition, server maintenance, component compatibility, tank pressure management, equipment warranties, and technical standards require further improvement. Future large-scale adoption will depend mainly on the commercialization of lower-impact fluids, native server compatibility, greater system standardization, and stronger lifecycle economics compared with alternative liquid cooling technologies.

This report is a detailed and comprehensive analysis for global Phase Change Immersion Cooling System 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 Phase Change Immersion Cooling System market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

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

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

Global Phase Change Immersion Cooling System market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K 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 Phase Change Immersion Cooling System

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 Phase Change Immersion Cooling System 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 Trane Technologies, MARA

Holdings, Wiwynn, AEWIN Technologies, Kenmec Mechanical Engineering, Fourier Cooling Solutions, E3 NV, etc.

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

Market Segmentation

Phase Change Immersion Cooling System 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

Open-bath Systems

Semi-hermetic Systems

Hermetically Sealed Systems

Market segment by Tank Orientation

Horizontal Tank Systems

Vertical Tank Systems

Market segment by Cooling Capacity

Below 100 kW

100?299 kW

300?599 kW

600 kW and Above

Market segment by Application

Data Center Operators

Cloud and AI Computing Providers

Other

Major players covered

Trane Technologies

MARA Holdings

Wiwynn

AEWIN Technologies

Kenmec Mechanical Engineering

Fourier Cooling Solutions

E3 NV

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 Phase Change Immersion Cooling System product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Phase Change Immersion Cooling System, with price, sales quantity, revenue, and global market share of Phase Change Immersion Cooling System from 2021 to 2026.

Chapter 3, the Phase Change Immersion Cooling System competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Phase Change Immersion Cooling System 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 Phase Change Immersion Cooling System 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 Phase Change Immersion Cooling System.

Chapter 14 and 15, to describe Phase Change Immersion Cooling System sales channel, distributors, customers, research findings and conclusion.

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