

Global Phase Change Immersion Cooling System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Phase Change Immersion Cooling System market size is expected to reach \$ 1038 million by 2032, rising at a market growth of 17.8% CAGR during the forecast period (2026-2032).

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 studies the global Phase Change Immersion Cooling System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Phase

Change Immersion Cooling System 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 Phase Change Immersion Cooling System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Phase Change Immersion Cooling System total production and demand, 2021-2032, (Units)

Global Phase Change Immersion Cooling System total production value, 2021-2032, (USD Million)

Global Phase Change Immersion Cooling System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Phase Change Immersion Cooling System consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Phase Change Immersion Cooling System domestic production, consumption, key domestic manufacturers and share

Global Phase Change Immersion Cooling System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Phase Change Immersion Cooling System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Phase Change Immersion Cooling System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Phase Change Immersion Cooling System market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Phase Change Immersion Cooling System market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, 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 Phase Change Immersion Cooling System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Phase Change Immersion Cooling System Market, Segmentation by Type:

Open-bath Systems

Semi-hermetic Systems

Hermetically Sealed Systems

Global Phase Change Immersion Cooling System Market, Segmentation by Tank Orientation:

Horizontal Tank Systems

Vertical Tank Systems

Global Phase Change Immersion Cooling System Market, Segmentation by Cooling Capacity:

Below 100 kW

100?299 kW

300?599 kW

600 kW and Above

Global Phase Change Immersion Cooling System Market, Segmentation by Application:

Data Center Operators

Cloud and AI Computing Providers

Other

Companies Profiled:

Trane Technologies

MARA Holdings

Wiwynn

AEWIN Technologies

Kenmec Mechanical Engineering

Fourier Cooling Solutions

E3 NV

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

- 2.1 World Phase Change Immersion Cooling System Demand (2021-2032)
- 2.2 World Phase Change Immersion Cooling System Consumption by Region
 - 2.2.1 World Phase Change Immersion Cooling System Consumption by Region (2021-2026)
 - 2.2.2 World Phase Change Immersion Cooling System Consumption Forecast by Region (2027-2032)
- 2.3 United States Phase Change Immersion Cooling System Consumption (2021-2032)
- 2.4 China Phase Change Immersion Cooling System Consumption (2021-2032)
- 2.5 Europe Phase Change Immersion Cooling System Consumption (2021-2032)

- 2.6 Japan Phase Change Immersion Cooling System Consumption (2021-2032)
- 2.7 South Korea Phase Change Immersion Cooling System Consumption (2021-2032)
- 2.8 ASEAN Phase Change Immersion Cooling System Consumption (2021-2032)
- 2.9 India Phase Change Immersion Cooling System Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

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

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Phase Change Immersion Cooling System Production Value Comparison

4.1.1 United States VS China: Phase Change Immersion Cooling System Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Phase Change Immersion Cooling System Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Phase Change Immersion Cooling System Production Comparison

4.2.1 United States VS China: Phase Change Immersion Cooling System Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Phase Change Immersion Cooling System Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Phase Change Immersion Cooling System Consumption Comparison

4.3.1 United States VS China: Phase Change Immersion Cooling System Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Phase Change Immersion Cooling System Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Phase Change Immersion Cooling System Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Phase Change Immersion Cooling System Manufacturers, Headquarters and Production Site (States, Country)

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

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

4.5 China Based Phase Change Immersion Cooling System Manufacturers and Market Share

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

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

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

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

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

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

4.6.3 Rest of World Based Manufacturers Phase Change Immersion Cooling System

Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

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

5.2 Segment Introduction by Type

5.2.1 Open-bath Systems

5.2.2 Semi-hermetic Systems

5.2.3 Hermetically Sealed Systems

5.3 Market Segment by Type

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

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

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

6 MARKET ANALYSIS BY TANK ORIENTATION

6.1 World Phase Change Immersion Cooling System Market Size Overview by Tank
Orientation: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Tank Orientation

6.2.1 Horizontal Tank Systems

6.2.2 Vertical Tank Systems

6.3 Market Segment by Tank Orientation

6.3.1 World Phase Change Immersion Cooling System Production by Tank Orientation
(2021-2032)

6.3.2 World Phase Change Immersion Cooling System Production Value by Tank
Orientation (2021-2032)

6.3.3 World Phase Change Immersion Cooling System Average Price by Tank
Orientation (2021-2032)

7 MARKET ANALYSIS BY COOLING CAPACITY

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

7.2 Segment Introduction by Cooling Capacity

7.2.1 Below 100 kW

7.2.2 100?299 kW

7.2.3 300?599 kW

7.2.4 600 kW and Above

7.3 Market Segment by Cooling Capacity

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

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

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

8 MARKET ANALYSIS BY APPLICATION

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

8.2 Segment Introduction by Application

8.2.1 Data Center Operators

8.2.2 Cloud and AI Computing Providers

8.2.3 Other

8.3 Market Segment by Application

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

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

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

9 COMPANY PROFILES

9.1 Trane Technologies

9.1.1 Trane Technologies Details

9.1.2 Trane Technologies Major Business

9.1.3 Trane Technologies Phase Change Immersion Cooling System Product and Services

9.1.4 Trane Technologies Phase Change Immersion Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Trane Technologies Recent Developments/Updates

9.1.6 Trane Technologies Competitive Strengths & Weaknesses

9.2 MARA Holdings

- 9.2.1 MARA Holdings Details
- 9.2.2 MARA Holdings Major Business
- 9.2.3 MARA Holdings Phase Change Immersion Cooling System Product and Services
- 9.2.4 MARA Holdings Phase Change Immersion Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.2.5 MARA Holdings Recent Developments/Updates
- 9.2.6 MARA Holdings Competitive Strengths & Weaknesses
- 9.3 Wiwynn
 - 9.3.1 Wiwynn Details
 - 9.3.2 Wiwynn Major Business
 - 9.3.3 Wiwynn Phase Change Immersion Cooling System Product and Services
 - 9.3.4 Wiwynn Phase Change Immersion Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.3.5 Wiwynn Recent Developments/Updates
 - 9.3.6 Wiwynn Competitive Strengths & Weaknesses
- 9.4 AEWIN Technologies
 - 9.4.1 AEWIN Technologies Details
 - 9.4.2 AEWIN Technologies Major Business
 - 9.4.3 AEWIN Technologies Phase Change Immersion Cooling System Product and Services
 - 9.4.4 AEWIN Technologies Phase Change Immersion Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 AEWIN Technologies Recent Developments/Updates
 - 9.4.6 AEWIN Technologies Competitive Strengths & Weaknesses
- 9.5 Kenmec Mechanical Engineering
 - 9.5.1 Kenmec Mechanical Engineering Details
 - 9.5.2 Kenmec Mechanical Engineering Major Business
 - 9.5.3 Kenmec Mechanical Engineering Phase Change Immersion Cooling System Product and Services
 - 9.5.4 Kenmec Mechanical Engineering Phase Change Immersion Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Kenmec Mechanical Engineering Recent Developments/Updates
 - 9.5.6 Kenmec Mechanical Engineering Competitive Strengths & Weaknesses
- 9.6 Fourier Cooling Solutions
 - 9.6.1 Fourier Cooling Solutions Details
 - 9.6.2 Fourier Cooling Solutions Major Business
 - 9.6.3 Fourier Cooling Solutions Phase Change Immersion Cooling System Product and Services

9.6.4 Fourier Cooling Solutions Phase Change Immersion Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Fourier Cooling Solutions Recent Developments/Updates

9.6.6 Fourier Cooling Solutions Competitive Strengths & Weaknesses

9.7 E3 NV

9.7.1 E3 NV Details

9.7.2 E3 NV Major Business

9.7.3 E3 NV Phase Change Immersion Cooling System Product and Services

9.7.4 E3 NV Phase Change Immersion Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 E3 NV Recent Developments/Updates

9.7.6 E3 NV Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Phase Change Immersion Cooling System Industry Chain

10.2 Phase Change Immersion Cooling System Upstream Analysis

10.2.1 Phase Change Immersion Cooling System Core Raw Materials

10.2.2 Main Manufacturers of Phase Change Immersion Cooling System Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Phase Change Immersion Cooling System Production Mode

10.6 Phase Change Immersion Cooling System Procurement Model

10.7 Phase Change Immersion Cooling System Industry Sales Model and Sales Channels

10.7.1 Phase Change Immersion Cooling System Sales Model

10.7.2 Phase Change Immersion Cooling System Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

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

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

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

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

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

Table 6. World Phase Change Immersion Cooling System Production by Region (2021-2026) & (Units)

Table 7. World Phase Change Immersion Cooling System Production by Region (2027-2032) & (Units)

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

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

Table 10. World Phase Change Immersion Cooling System Average Price by Region (2021-2026) & (K US\$/Unit)

Table 11. World Phase Change Immersion Cooling System Average Price by Region (2027-2032) & (K US\$/Unit)

Table 12. Phase Change Immersion Cooling System Major Market Trends

Table 13. World Phase Change Immersion Cooling System Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Phase Change Immersion Cooling System Consumption by Region (2021-2026) & (Units)

Table 15. World Phase Change Immersion Cooling System Consumption Forecast by Region (2027-2032) & (Units)

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

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

Table 18. World Phase Change Immersion Cooling System Production by Manufacturer (2021-2026) & (Units)

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

Table 20. World Phase Change Immersion Cooling System Average Price by Manufacturer (2021-2026) & (K US\$/Unit)

Table 21. Global Phase Change Immersion Cooling System Company Evaluation Quadrant

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

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

Table 24. Phase Change Immersion Cooling System Market: Company Product Type Footprint

Table 25. Phase Change Immersion Cooling System Market: Company Product Application Footprint

Table 26. Phase Change Immersion Cooling System Competitive Factors

Table 27. Phase Change Immersion Cooling System New Entrant and Capacity Expansion Plans

Table 28. Phase Change Immersion Cooling System Mergers & Acquisitions Activity

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

Table 30. United States VS China Phase Change Immersion Cooling System Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Phase Change Immersion Cooling System Consumption Comparison, (2021 & 2025 & 2032) & (Units)

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

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

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

Table 35. United States Based Manufacturers Phase Change Immersion Cooling System Production (2021-2026) & (Units)

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

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

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

Table 39. China Based Manufacturers Phase Change Immersion Cooling System

Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Phase Change Immersion Cooling System Production, (2021-2026) & (Units)

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

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

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

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

Table 45. Rest of World Based Manufacturers Phase Change Immersion Cooling System Production, (2021-2026) & (Units)

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

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

Table 48. World Phase Change Immersion Cooling System Production by Type (2021-2026) & (Units)

Table 49. World Phase Change Immersion Cooling System Production by Type (2027-2032) & (Units)

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

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

Table 52. World Phase Change Immersion Cooling System Average Price by Type (2021-2026) & (K US\$/Unit)

Table 53. World Phase Change Immersion Cooling System Average Price by Type (2027-2032) & (K US\$/Unit)

Table 54. World Phase Change Immersion Cooling System Production Value by Tank Orientation, (USD Million), 2021 & 2025 & 2032

Table 55. World Phase Change Immersion Cooling System Production by Tank Orientation (2021-2026) & (Units)

Table 56. World Phase Change Immersion Cooling System Production by Tank Orientation (2027-2032) & (Units)

Table 57. World Phase Change Immersion Cooling System Production Value by Tank Orientation (2021-2026) & (USD Million)

Table 58. World Phase Change Immersion Cooling System Production Value by Tank Orientation (2027-2032) & (USD Million)

Table 59. World Phase Change Immersion Cooling System Average Price by Tank Orientation (2021-2026) & (K US\$/Unit)

Table 60. World Phase Change Immersion Cooling System Average Price by Tank Orientation (2027-2032) & (K US\$/Unit)

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

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

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

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

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

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

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

Table 68. World Phase Change Immersion Cooling System Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Phase Change Immersion Cooling System Production by Application (2021-2026) & (Units)

Table 70. World Phase Change Immersion Cooling System Production by Application (2027-2032) & (Units)

Table 71. World Phase Change Immersion Cooling System Production Value by Application (2021-2026) & (USD Million)

Table 72. World Phase Change Immersion Cooling System Production Value by Application (2027-2032) & (USD Million)

Table 73. World Phase Change Immersion Cooling System Average Price by Application (2021-2026) & (K US\$/Unit)

Table 74. World Phase Change Immersion Cooling System Average Price by Application (2027-2032) & (K US\$/Unit)

Table 75. Trane Technologies Basic Information, Manufacturing Base and Competitors

Table 76. Trane Technologies Major Business

Table 77. Trane Technologies Phase Change Immersion Cooling System Product and Services

Table 78. Trane Technologies Phase Change Immersion Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Trane Technologies Recent Developments/Updates

Table 80. Trane Technologies Competitive Strengths & Weaknesses

Table 81. MARA Holdings Basic Information, Manufacturing Base and Competitors

Table 82. MARA Holdings Major Business

Table 83. MARA Holdings Phase Change Immersion Cooling System Product and Services

Table 84. MARA Holdings Phase Change Immersion Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. MARA Holdings Recent Developments/Updates

Table 86. MARA Holdings Competitive Strengths & Weaknesses

Table 87. Wiwynn Basic Information, Manufacturing Base and Competitors

Table 88. Wiwynn Major Business

Table 89. Wiwynn Phase Change Immersion Cooling System Product and Services

Table 90. Wiwynn Phase Change Immersion Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Wiwynn Recent Developments/Updates

Table 92. Wiwynn Competitive Strengths & Weaknesses

Table 93. AEWIN Technologies Basic Information, Manufacturing Base and Competitors

Table 94. AEWIN Technologies Major Business

Table 95. AEWIN Technologies Phase Change Immersion Cooling System Product and Services

Table 96. AEWIN Technologies Phase Change Immersion Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. AEWIN Technologies Recent Developments/Updates

Table 98. AEWIN Technologies Competitive Strengths & Weaknesses

Table 99. Kenmec Mechanical Engineering Basic Information, Manufacturing Base and Competitors

Table 100. Kenmec Mechanical Engineering Major Business

Table 101. Kenmec Mechanical Engineering Phase Change Immersion Cooling System Product and Services

Table 102. Kenmec Mechanical Engineering Phase Change Immersion Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Kenmec Mechanical Engineering Recent Developments/Updates

Table 104. Kenmec Mechanical Engineering Competitive Strengths & Weaknesses

Table 105. Fourier Cooling Solutions Basic Information, Manufacturing Base and Competitors

Table 106. Fourier Cooling Solutions Major Business

Table 107. Fourier Cooling Solutions Phase Change Immersion Cooling System Product and Services

Table 108. Fourier Cooling Solutions Phase Change Immersion Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Fourier Cooling Solutions Recent Developments/Updates

Table 110. Fourier Cooling Solutions Competitive Strengths & Weaknesses

Table 111. E3 NV Basic Information, Manufacturing Base and Competitors

Table 112. E3 NV Major Business

Table 113. E3 NV Phase Change Immersion Cooling System Product and Services

Table 114. E3 NV Phase Change Immersion Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. E3 NV Recent Developments/Updates

Table 116. E3 NV Competitive Strengths & Weaknesses

Table 117. Global Key Players of Phase Change Immersion Cooling System Upstream (Raw Materials)

Table 118. Global Phase Change Immersion Cooling System Typical Customers

Table 119. Phase Change Immersion Cooling System Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Phase Change Immersion Cooling System Picture

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

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

Figure 4. World Phase Change Immersion Cooling System Production (2021-2032) & (Units)

Figure 5. World Phase Change Immersion Cooling System Average Price (2021-2032) & (K US\$/Unit)

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

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

Figure 8. North America Phase Change Immersion Cooling System Production (2021-2032) & (Units)

Figure 9. Europe Phase Change Immersion Cooling System Production (2021-2032) & (Units)

Figure 10. China Phase Change Immersion Cooling System Production (2021-2032) & (Units)

Figure 11. Japan Phase Change Immersion Cooling System Production (2021-2032) & (Units)

Figure 12. Phase Change Immersion Cooling System Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Phase Change Immersion Cooling System Consumption (2021-2032) & (Units)

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

Figure 16. United States Phase Change Immersion Cooling System Consumption (2021-2032) & (Units)

Figure 17. China Phase Change Immersion Cooling System Consumption (2021-2032) & (Units)

Figure 18. Europe Phase Change Immersion Cooling System Consumption (2021-2032) & (Units)

Figure 19. Japan Phase Change Immersion Cooling System Consumption (2021-2032) & (Units)

Figure 20. South Korea Phase Change Immersion Cooling System Consumption (2021-2032) & (Units)

Figure 21. ASEAN Phase Change Immersion Cooling System Consumption (2021-2032) & (Units)

Figure 22. India Phase Change Immersion Cooling System Consumption (2021-2032) & (Units)

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

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

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

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

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

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

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

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

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

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

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

Figure 34. Open-bath Systems

Figure 35. Semi-hermetic Systems

Figure 36. Hermetically Sealed Systems

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

Figure 38. World Phase Change Immersion Cooling System Production Value Market Share by Type (2021-2032)

Figure 39. World Phase Change Immersion Cooling System Average Price by Type (2021-2032) & (K US\$/Unit)

Figure 40. World Phase Change Immersion Cooling System Production Value by Tank Orientation, (USD Million), 2021 & 2025 & 2032

Figure 41. World Phase Change Immersion Cooling System Production Value Market Share by Tank Orientation in 2025

Figure 42. Horizontal Tank Systems

Figure 43. Vertical Tank Systems

Figure 44. World Phase Change Immersion Cooling System Production Market Share by Tank Orientation (2021-2032)

Figure 45. World Phase Change Immersion Cooling System Production Value Market Share by Tank Orientation (2021-2032)

Figure 46. World Phase Change Immersion Cooling System Average Price by Tank Orientation (2021-2032) & (K US\$/Unit)

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

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

Figure 49. Below 100 kW

Figure 50. 100?299 kW

Figure 51. 300?599 kW

Figure 52. 600 kW and Above

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

Figure 54. World Phase Change Immersion Cooling System Production Value Market Share by Cooling Capacity (2021-2032)

Figure 55. World Phase Change Immersion Cooling System Average Price by Cooling Capacity (2021-2032) & (K US\$/Unit)

Figure 56. World Phase Change Immersion Cooling System Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 57. World Phase Change Immersion Cooling System Production Value Market Share by Application in 2025

Figure 58. Data Center Operators

Figure 59. Cloud and AI Computing Providers

Figure 60. Other

Figure 61. World Phase Change Immersion Cooling System Production Market Share by Application (2021-2032)

Figure 62. World Phase Change Immersion Cooling System Production Value Market Share by Application (2021-2032)

Figure 63. World Phase Change Immersion Cooling System Average Price by Application (2021-2032) & (K US\$/Unit)

Figure 64. Phase Change Immersion Cooling System Industry Chain

Figure 65. Phase Change Immersion Cooling System Procurement Model

Figure 66. Phase Change Immersion Cooling System Sales Model

Figure 67. Phase Change Immersion Cooling System Sales Channels, Direct Sales, and Distribution

Figure 68. Methodology

Figure 69. Research Process and Data Source

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