

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

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Abstracts

The global Server Immersion Cooling System market size is expected to reach \$ 3975 million by 2032, rising at a market growth of 10.1% CAGR during the forecast period (2026-2032).

Server immersion liquid cooling systems are high-density data center thermal management solutions in which servers, GPU nodes, AI training servers, or high-density computing equipment are directly submerged in an insulating cooling fluid. Heat generated by chips, memory, power supplies, and circuit boards is dissipated via single-phase or two-phase cooling media; the systems incorporate cooling tanks, liquid circulation pumps, heat exchangers, Coolant Distribution Units (CDUs), filtration systems, sensors, control software, and operations and maintenance (O&M) monitoring modules. These systems are primarily deployed in AI data centers, supercomputing centers, cloud computing centers, edge data centers, and high-power server clusters. In 2025, global sales volume for server immersion liquid cooling systems is estimated at approximately 12,850 units, with an average unit price of around \$154,000; the industry's average capacity utilization rate stands at approximately 71.6%, and the gross profit margin is about 34.8%. Upstream players operate in sectors such as fluorinated fluids, synthetic hydrocarbon coolants, mineral oil-based coolants, heat exchangers, pumps and valves, filters, sensors, server cabinets, sheet metal components, sealing materials, controllers, electrical components, and engineering design. Downstream sectors include cloud computing service providers, AI computing centers, supercomputing centers, internet data centers, financial data centers, research institutions, telecommunications operators, and server OEMs. The product cost structure is broken down as follows: cooling fluid (approx. 24%), immersion tanks and cabinet structures (approx. 18%), CDUs and heat exchangers (approx. 20%), pumps, valves, filtration, and piping (approx. 9%), sensors, control systems, and software

(approx. 7%), engineering design and on-site installation (approx. 8%), manufacturing labor (approx. 5%), testing, certification, and quality control (approx. 4%), and packaging, logistics, and after-sales O&M (approx. 5%). The list of requirements encompasses immersion cooling systems for AI servers and GPU clusters, single-phase and two-phase immersion liquid cooling systems, modular and integrated immersion liquid cooling systems, high-density rack cooling systems, Coolant Distribution Units (CDUs), low-PUE data center retrofit solutions, and specialized coolants for immersion liquid cooling. Downstream customers include cloud service providers, internet platforms, AI large-model computing operators, supercomputing centers, financial institution data centers, telecommunications carriers, IDC operators, server OEMs, edge computing operators, and research institutes. Business opportunities are driven by policies regarding green data centers, dual controls on energy consumption, computing infrastructure development, energy conservation and emission reduction, and the centralized deployment of AI computing centers. Technological innovation is propelled by advancements in high-performance dielectric coolants, low-energy pump circulation, hybrid cold-plate and immersion architectures, intelligent temperature control, modular delivery, waste heat recovery, and server structural adaptation. Shifts in customer demand are reflected in the growing need for lower PUE, higher rack power density, reduced noise levels, decreased reliance on air cooling, faster computing power deployment, and lower long-term O&M costs.

Immersion liquid cooling systems for servers represent a high-growth segment within thermal management technologies for high-density data centers, driven primarily by AI training clusters, GPU servers, supercomputing centers, cloud capacity expansion, and the development of green data centers. While traditional air cooling faces challenges regarding thermal efficiency, noise, energy consumption, and space utilization in scenarios where single-rack power exceeds 30 kW, and cold-plate liquid cooling offers easier compatibility with existing server form factors, immersion liquid cooling holds distinct advantages in heat dissipation uniformity, heat exchange efficiency, PUE control, and equipment reliability?particularly in scenarios involving ultra-high power density and centralized computing power. Over the next six to eight years, industry growth will be propelled by the training of large AI models, the decentralization of inference computing, supercomputing upgrades, energy-efficiency retrofits of legacy data centers, and the adoption of liquid cooling by server manufacturers; however, market scaling remains constrained by factors such as coolant costs, server maintenance models, operational habits, long-term reliability validation, material compatibility, and a lack of standardization. While North American and European markets prioritize energy efficiency regulations, carbon emissions, and validation by major cloud providers, the Chinese market?driven by computing infrastructure

development, green data center policies, and AI investments by internet companies?exhibits strong growth momentum. Competition is shifting from the delivery of individual units to capabilities in system integration, coolant ecosystems, server compatibility, energy efficiency metrics, operational safety, modular deployment, and full-lifecycle cost control; consequently, enterprises capable of coordinating across coolants, CDUs, immersion tanks, control systems, and data center engineering services are better positioned to secure large-scale project orders.

This report studies the global Server Immersion Cooling System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Server 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 Server Immersion Cooling System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Server Immersion Cooling System total production and demand, 2021-2032, (K Units)

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

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

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

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

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

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

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

This report profiles key players in the global Server 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 Fujitsu (JP), Supermicro (US),

Mitsubishi Heavy Industries (JP), Delta Electronics (TW), Araner (ES), AMAX (US), DCX (PL), Baltimore Aircoil Company (US), FCN (TW), CoolBitts (US), 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 Server Immersion Cooling System market

Detailed Segmentation:

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

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Server Immersion Cooling System Market, Segmentation by Type:

Single-phase Immersion Liquid Cooling System

Dual-phase Immersion Liquid Cooling System

Global Server Immersion Cooling System Market, Segmentation by System Design:

Modular Immersion Liquid Cooling System

Integrated Immersion Liquid Cooling System

Global Server Immersion Cooling System Market, Segmentation by PUE:

?1.05

?1.1

?1.2

Others

Global Server Immersion Cooling System Market, Segmentation by Application:

Desktop Server

Rack Server

Blade Server

Cabinet Server

Other

Companies Profiled:

Fujitsu (JP)

Supermicro (US)

Mitsubishi Heavy Industries (JP)

Delta Electronics (TW)

Araner (ES)

AMAX (US)

DCX (PL)

Baltimore Aircoil Company (US)

FCN (TW)

CoolBitts (US)

DUG (AU)

UL Solutions (US)

Aspsys (US)

Nortek Data Center Cooling (US)

Ingrasys (TW)

Asperitas (NL)

PEZY Computing (JP)

Envicool (CN)

Key Questions Answered:

1. How big is the global Server Immersion Cooling System market?
2. What is the demand of the global Server Immersion Cooling System market?
3. What is the year over year growth of the global Server Immersion Cooling System

market?

4. What is the production and production value of the global Server Immersion Cooling System market?
5. Who are the key producers in the global Server Immersion Cooling System market?
6. What are the growth factors driving the market demand?

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