

# Global Training Cluster Dielectric Coolant Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Training Cluster Dielectric Coolant market size is expected to reach \$ 220 million by 2032, rising at a market growth of 27.8% CAGR during the forecast period (2026-2032).

Training cluster dielectric coolant is a specialized thermal management fluid designed for AI training servers, GPU accelerator full racks, high-density HPC nodes, and large-model training data centers. Its core function is to directly contact and absorb heat from chips, memory, power modules, motherboards, and connectors under conditions of electrical non-conductivity, corrosion resistance, and compatibility with critical electronic materials. These products are commonly based on synthetic hydrocarbons, mineral oils, fluorinated fluids, silicone-based liquids, natural esters, or synthetic esters, and operate through single-phase circulating heat exchange, two-phase boiling and condensation, immersion tank circulation, rack pre-filling, or spray-contact cooling. Key performance indicators include dielectric strength, volume resistivity, thermal conductivity, specific heat capacity, viscosity, boiling point, flash point, oxidation stability, material compatibility, low-GWP attributes, and recyclability. Typical customers include AI cloud service providers, supercomputing centers, internet large-model platforms, server manufacturers, liquid cooling system integrators, and data center operators. Delivery models include bulk fluids, system pre-filled fluids, customized formulations, compatibility testing services, and fluid lifecycle maintenance. The commercial value of this product lies not only in supporting stable operation of high-power training hardware, but also in reducing cooling energy consumption, lowering water use, increasing rack power density, and providing a scalable thermal foundation for future higher-TDP GPUs and AI accelerator clusters.

The demand for training cluster dielectric coolant is evolving from data center energy-

saving retrofits into a core requirement for AI training infrastructure. Large-model training clusters impose higher continuous-load requirements on GPUs and AI accelerators, while rack power density and chip heat flux continue to rise rapidly. This pushes traditional air-cooling architectures toward their limits in energy efficiency, noise, space utilization, and operational stability. By directly contacting electronic components and absorbing heat, dielectric coolants can reduce dependence on fans, cold aisles, and parts of conventional air-conditioning systems, while forming a tightly integrated solution with immersion tanks, full-rack liquid cooling, and spray-based liquid cooling. Major suppliers are already positioning AI, high-performance computing, hyperscale data centers, and edge computing as key application areas, indicating that these fluids are no longer merely general-purpose chemicals, but part of server design, data center planning, and compute delivery capability. As training cluster power consumption continues to rise, customers will place greater emphasis on dielectric safety, thermal stability, low-viscosity pumpability, material compatibility, and long-term maintenance costs. Suppliers will also shift from selling fluids alone to providing validation, pre-filling, inspection, recycling, and joint certification services.

The technology roadmap will evolve around four major directions: single-phase scalability, two-phase high performance, lower-carbon materials, and platform-based validation. Single-phase dielectric coolants have relatively simple system structures and lower operating complexity, making them suitable for large-scale replication across training clusters. As a result, synthetic hydrocarbons, silicone-based liquids, natural esters, and high-flash-point oil products are likely to maintain strong near-term availability. Two-phase dielectric coolants use latent heat from phase change to achieve higher heat-transfer efficiency and offer a higher technical ceiling for high-heat-flux GPUs and future AI accelerators, but they require more demanding sealing, condensation, liquid-level control, and fluid-loss management. At the material level, low GWP, low toxicity, fluorine-free chemistry, bio-based content, and recyclability have become important differentiators for new products, both supporting data center sustainability goals and reducing future regulatory and supply uncertainties. At the same time, coolants must pass long-term compatibility testing with server materials, connectors, cables, seals, memory, and power modules. Future competition will therefore center on cross-vendor testing data, chip and server vendor certification, full-rack liquid cooling ecosystem partnerships, and reliable global supply.

The market outlook is broadly positive. Training cluster dielectric coolant will benefit from AI compute expansion, green data center policy, rising rack power density, and water-resource constraints. Public market data indicate that the data center immersion cooling fluids market is expected to maintain high growth from 2025 to 2032, with AI/ML

data centers identified as an important application type. This provides a strong upside foundation for the training cluster segment. For customers, coolant procurement cost is only one part of total cost of ownership; the more important value lies in reducing PUE, lowering water consumption, shrinking facility footprint, extending equipment life, and improving training system stability. For suppliers, near-term opportunities will come from pilot projects and pre-filled fluids for new AI data centers, mid-term opportunities from scaled replacement and fluid maintenance, and long-term opportunities from closed-loop recovery, regenerated fluids, and co-development with server architecture. Because training cluster projects are typically concentrated among financially strong, energy-sensitive customers with very high reliability requirements, premium dielectric coolants are likely to achieve higher value density than ordinary industrial lubricants and thermal oils.

This report studies the global Training Cluster Dielectric Coolant production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Training Cluster Dielectric Coolant 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 Training Cluster Dielectric Coolant that contribute to its increasing demand across many markets.

#### Highlights and key features of the study

Global Training Cluster Dielectric Coolant total production and demand, 2021-2032, (K Gallon)

Global Training Cluster Dielectric Coolant total production value, 2021-2032, (USD Million)

Global Training Cluster Dielectric Coolant production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Gallon), (based on production site)

Global Training Cluster Dielectric Coolant consumption by region & country, CAGR, 2021-2032 & (K Gallon)

U.S. VS China: Training Cluster Dielectric Coolant domestic production, consumption, key domestic manufacturers and share

Global Training Cluster Dielectric Coolant production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Gallon)

Global Training Cluster Dielectric Coolant production by Cooling Phase State, production, value, CAGR, 2021-2032, (USD Million) & (K Gallon)

Global Training Cluster Dielectric Coolant production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Gallon)

This report profiles key players in the global Training Cluster Dielectric Coolant 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 Shell plc, Exxon Mobil Corporation, The Chemours Company, Dow Inc., bp p.l.c., TotalEnergies SE, Engineered Fluids, Inc., SK enmove Co., Ltd., GS Caltex Corporation, S-OIL Corporation, 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 Training Cluster Dielectric Coolant market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Gallon) and average price (USD/Gallon) by manufacturer, by Cooling Phase State, 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 Training Cluster Dielectric Coolant Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## Global Training Cluster Dielectric Coolant Market, Segmentation by Cooling Phase State:

Single-Phase Dielectric Coolant

Two-Phase Dielectric Coolant

Other

## Global Training Cluster Dielectric Coolant Market, Segmentation by Material System:

Synthetic Hydrocarbon Dielectric Coolant

Mineral Oil Dielectric Coolant

Fluorinated Dielectric Coolant

Silicone-Based Dielectric Coolant

Natural Ester Dielectric Coolant

Synthetic Ester Dielectric Coolant

Other

## Global Training Cluster Dielectric Coolant Market, Segmentation by Flash Point Grade:

No-Flash-Point Dielectric Coolant

Normal-Flash-Point Dielectric Coolant

High-Flash-Point Dielectric Coolant

Ultra-High-Flash-Point Dielectric Coolant

## Global Training Cluster Dielectric Coolant Market, Segmentation by Application:

GPU Training Server

AI Accelerator Full Rack

High-Density HPC Cluster

Other

## Companies Profiled:

Shell plc

Exxon Mobil Corporation

The Chemours Company

Dow Inc.

bp p.l.c.

TotalEnergies SE

Engineered Fluids, Inc.

SK enmove Co., Ltd.

GS Caltex Corporation

S-OIL Corporation

Cargill, Incorporated

Syensqo SA

Inventec Performance Chemicals

Submer Technologies S.L.

Lubrizol Corporation

Perstorp AB

FUCHS SE

ENEOS Corporation

**Key Questions Answered:**

1. How big is the global Training Cluster Dielectric Coolant market?
2. What is the demand of the global Training Cluster Dielectric Coolant market?
3. What is the year over year growth of the global Training Cluster Dielectric Coolant market?
4. What is the production and production value of the global Training Cluster Dielectric Coolant market?
5. Who are the key producers in the global Training Cluster Dielectric Coolant market?
6. What are the growth factors driving the market demand?

## Contents

### 1 SUPPLY SUMMARY

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

### 2 DEMAND SUMMARY

- 2.1 World Training Cluster Dielectric Coolant Demand (2021-2032)
- 2.2 World Training Cluster Dielectric Coolant Consumption by Region
  - 2.2.1 World Training Cluster Dielectric Coolant Consumption by Region (2021-2026)
  - 2.2.2 World Training Cluster Dielectric Coolant Consumption Forecast by Region (2027-2032)
- 2.3 United States Training Cluster Dielectric Coolant Consumption (2021-2032)
- 2.4 China Training Cluster Dielectric Coolant Consumption (2021-2032)
- 2.5 Europe Training Cluster Dielectric Coolant Consumption (2021-2032)
- 2.6 Japan Training Cluster Dielectric Coolant Consumption (2021-2032)
- 2.7 South Korea Training Cluster Dielectric Coolant Consumption (2021-2032)
- 2.8 ASEAN Training Cluster Dielectric Coolant Consumption (2021-2032)
- 2.9 India Training Cluster Dielectric Coolant Consumption (2021-2032)

### **3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS**

3.1 World Training Cluster Dielectric Coolant Production Value by Manufacturer (2021-2026)

3.2 World Training Cluster Dielectric Coolant Production by Manufacturer (2021-2026)

3.3 World Training Cluster Dielectric Coolant Average Price by Manufacturer (2021-2026)

3.4 Training Cluster Dielectric Coolant Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Training Cluster Dielectric Coolant Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Training Cluster Dielectric Coolant in 2025

3.5.3 Global Concentration Ratios (CR8) for Training Cluster Dielectric Coolant in 2025

3.6 Training Cluster Dielectric Coolant Market: Overall Company Footprint Analysis

3.6.1 Training Cluster Dielectric Coolant Market: Region Footprint

3.6.2 Training Cluster Dielectric Coolant Market: Company Product Type Footprint

3.6.3 Training Cluster Dielectric Coolant 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: Training Cluster Dielectric Coolant Production Value Comparison

4.1.1 United States VS China: Training Cluster Dielectric Coolant Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Training Cluster Dielectric Coolant Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Training Cluster Dielectric Coolant Production Comparison

4.2.1 United States VS China: Training Cluster Dielectric Coolant Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Training Cluster Dielectric Coolant Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Training Cluster Dielectric Coolant Consumption

## Comparison

### 4.3.1 United States VS China: Training Cluster Dielectric Coolant Consumption

#### Comparison (2021 & 2025 & 2032)

### 4.3.2 United States VS China: Training Cluster Dielectric Coolant Consumption Market Share Comparison (2021 & 2025 & 2032)

## 4.4 United States Based Training Cluster Dielectric Coolant Manufacturers and Market Share, 2021-2026

### 4.4.1 United States Based Training Cluster Dielectric Coolant Manufacturers, Headquarters and Production Site (States, Country)

### 4.4.2 United States Based Manufacturers Training Cluster Dielectric Coolant Production Value (2021-2026)

### 4.4.3 United States Based Manufacturers Training Cluster Dielectric Coolant Production (2021-2026)

## 4.5 China Based Training Cluster Dielectric Coolant Manufacturers and Market Share

### 4.5.1 China Based Training Cluster Dielectric Coolant Manufacturers, Headquarters and Production Site (Province, Country)

### 4.5.2 China Based Manufacturers Training Cluster Dielectric Coolant Production Value (2021-2026)

### 4.5.3 China Based Manufacturers Training Cluster Dielectric Coolant Production (2021-2026)

## 4.6 Rest of World Based Training Cluster Dielectric Coolant Manufacturers and Market Share, 2021-2026

### 4.6.1 Rest of World Based Training Cluster Dielectric Coolant Manufacturers, Headquarters and Production Site (State, Country)

### 4.6.2 Rest of World Based Manufacturers Training Cluster Dielectric Coolant Production Value (2021-2026)

### 4.6.3 Rest of World Based Manufacturers Training Cluster Dielectric Coolant Production (2021-2026)

## 5 MARKET ANALYSIS BY COOLING PHASE STATE

### 5.1 World Training Cluster Dielectric Coolant Market Size Overview by Cooling Phase State: 2021 VS 2025 VS 2032

## 5.2 Segment Introduction by Cooling Phase State

### 5.2.1 Single-Phase Dielectric Coolant

### 5.2.2 Two-Phase Dielectric Coolant

### 5.2.3 Other

## 5.3 Market Segment by Cooling Phase State

### 5.3.1 World Training Cluster Dielectric Coolant Production by Cooling Phase State

(2021-2032)

5.3.2 World Training Cluster Dielectric Coolant Production Value by Cooling Phase State (2021-2032)

5.3.3 World Training Cluster Dielectric Coolant Average Price by Cooling Phase State (2021-2032)

## **6 MARKET ANALYSIS BY MATERIAL SYSTEM**

6.1 World Training Cluster Dielectric Coolant Market Size Overview by Material System: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Material System

6.2.1 Synthetic Hydrocarbon Dielectric Coolant

6.2.2 Mineral Oil Dielectric Coolant

6.2.3 Fluorinated Dielectric Coolant

6.2.4 Silicone-Based Dielectric Coolant

6.2.5 Natural Ester Dielectric Coolant

6.2.6 Synthetic Ester Dielectric Coolant

6.2.7 Other

6.3 Market Segment by Material System

6.3.1 World Training Cluster Dielectric Coolant Production by Material System (2021-2032)

6.3.2 World Training Cluster Dielectric Coolant Production Value by Material System (2021-2032)

6.3.3 World Training Cluster Dielectric Coolant Average Price by Material System (2021-2032)

## **7 MARKET ANALYSIS BY FLASH POINT GRADE**

7.1 World Training Cluster Dielectric Coolant Market Size Overview by Flash Point Grade: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Flash Point Grade

7.2.1 No-Flash-Point Dielectric Coolant

7.2.2 Normal-Flash-Point Dielectric Coolant

7.2.3 High-Flash-Point Dielectric Coolant

7.2.4 Ultra-High-Flash-Point Dielectric Coolant

7.3 Market Segment by Flash Point Grade

7.3.1 World Training Cluster Dielectric Coolant Production by Flash Point Grade (2021-2032)

7.3.2 World Training Cluster Dielectric Coolant Production Value by Flash Point Grade

(2021-2032)

7.3.3 World Training Cluster Dielectric Coolant Average Price by Flash Point Grade  
(2021-2032)

## **8 MARKET ANALYSIS BY APPLICATION**

8.1 World Training Cluster Dielectric Coolant Market Size Overview by Application:  
2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 GPU Training Server

8.2.2 AI Accelerator Full Rack

8.2.3 High-Density HPC Cluster

8.2.4 Other

8.3 Market Segment by Application

8.3.1 World Training Cluster Dielectric Coolant Production by Application (2021-2032)  
8.3.2 World Training Cluster Dielectric Coolant Production Value by Application  
(2021-2032)

8.3.3 World Training Cluster Dielectric Coolant Average Price by Application  
(2021-2032)

## **9 COMPANY PROFILES**

9.1 Shell plc

9.1.1 Shell plc Details

9.1.2 Shell plc Major Business

9.1.3 Shell plc Training Cluster Dielectric Coolant Product and Services

9.1.4 Shell plc Training Cluster Dielectric Coolant Production, Price, Value, Gross  
Margin and Market Share (2021-2026)

9.1.5 Shell plc Recent Developments/Updates

9.1.6 Shell plc Competitive Strengths & Weaknesses

9.2 Exxon Mobil Corporation

9.2.1 Exxon Mobil Corporation Details

9.2.2 Exxon Mobil Corporation Major Business

9.2.3 Exxon Mobil Corporation Training Cluster Dielectric Coolant Product and  
Services

9.2.4 Exxon Mobil Corporation Training Cluster Dielectric Coolant Production, Price,  
Value, Gross Margin and Market Share (2021-2026)

9.2.5 Exxon Mobil Corporation Recent Developments/Updates

9.2.6 Exxon Mobil Corporation Competitive Strengths & Weaknesses

### 9.3 The Chemours Company

#### 9.3.1 The Chemours Company Details

#### 9.3.2 The Chemours Company Major Business

#### 9.3.3 The Chemours Company Training Cluster Dielectric Coolant Product and Services

#### 9.3.4 The Chemours Company Training Cluster Dielectric Coolant Production, Price, Value, Gross Margin and Market Share (2021-2026)

#### 9.3.5 The Chemours Company Recent Developments/Updates

#### 9.3.6 The Chemours Company Competitive Strengths & Weaknesses

### 9.4 Dow Inc.

#### 9.4.1 Dow Inc. Details

#### 9.4.2 Dow Inc. Major Business

#### 9.4.3 Dow Inc. Training Cluster Dielectric Coolant Product and Services

#### 9.4.4 Dow Inc. Training Cluster Dielectric Coolant Production, Price, Value, Gross Margin and Market Share (2021-2026)

#### 9.4.5 Dow Inc. Recent Developments/Updates

#### 9.4.6 Dow Inc. Competitive Strengths & Weaknesses

### 9.5 bp p.l.c.

#### 9.5.1 bp p.l.c. Details

#### 9.5.2 bp p.l.c. Major Business

#### 9.5.3 bp p.l.c. Training Cluster Dielectric Coolant Product and Services

#### 9.5.4 bp p.l.c. Training Cluster Dielectric Coolant Production, Price, Value, Gross Margin and Market Share (2021-2026)

#### 9.5.5 bp p.l.c. Recent Developments/Updates

#### 9.5.6 bp p.l.c. Competitive Strengths & Weaknesses

### 9.6 TotalEnergies SE

#### 9.6.1 TotalEnergies SE Details

#### 9.6.2 TotalEnergies SE Major Business

#### 9.6.3 TotalEnergies SE Training Cluster Dielectric Coolant Product and Services

#### 9.6.4 TotalEnergies SE Training Cluster Dielectric Coolant Production, Price, Value, Gross Margin and Market Share (2021-2026)

#### 9.6.5 TotalEnergies SE Recent Developments/Updates

#### 9.6.6 TotalEnergies SE Competitive Strengths & Weaknesses

### 9.7 Engineered Fluids, Inc.

#### 9.7.1 Engineered Fluids, Inc. Details

#### 9.7.2 Engineered Fluids, Inc. Major Business

#### 9.7.3 Engineered Fluids, Inc. Training Cluster Dielectric Coolant Product and Services

#### 9.7.4 Engineered Fluids, Inc. Training Cluster Dielectric Coolant Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.7.5 Engineered Fluids, Inc. Recent Developments/Updates
- 9.7.6 Engineered Fluids, Inc. Competitive Strengths & Weaknesses
- 9.8 SK enmove Co., Ltd.
  - 9.8.1 SK enmove Co., Ltd. Details
  - 9.8.2 SK enmove Co., Ltd. Major Business
  - 9.8.3 SK enmove Co., Ltd. Training Cluster Dielectric Coolant Product and Services
  - 9.8.4 SK enmove Co., Ltd. Training Cluster Dielectric Coolant Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.8.5 SK enmove Co., Ltd. Recent Developments/Updates
  - 9.8.6 SK enmove Co., Ltd. Competitive Strengths & Weaknesses
- 9.9 GS Caltex Corporation
  - 9.9.1 GS Caltex Corporation Details
  - 9.9.2 GS Caltex Corporation Major Business
  - 9.9.3 GS Caltex Corporation Training Cluster Dielectric Coolant Product and Services
  - 9.9.4 GS Caltex Corporation Training Cluster Dielectric Coolant Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.9.5 GS Caltex Corporation Recent Developments/Updates
  - 9.9.6 GS Caltex Corporation Competitive Strengths & Weaknesses
- 9.10 S-OIL Corporation
  - 9.10.1 S-OIL Corporation Details
  - 9.10.2 S-OIL Corporation Major Business
  - 9.10.3 S-OIL Corporation Training Cluster Dielectric Coolant Product and Services
  - 9.10.4 S-OIL Corporation Training Cluster Dielectric Coolant Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.10.5 S-OIL Corporation Recent Developments/Updates
  - 9.10.6 S-OIL Corporation Competitive Strengths & Weaknesses
- 9.11 Cargill, Incorporated
  - 9.11.1 Cargill, Incorporated Details
  - 9.11.2 Cargill, Incorporated Major Business
  - 9.11.3 Cargill, Incorporated Training Cluster Dielectric Coolant Product and Services
  - 9.11.4 Cargill, Incorporated Training Cluster Dielectric Coolant Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.11.5 Cargill, Incorporated Recent Developments/Updates
  - 9.11.6 Cargill, Incorporated Competitive Strengths & Weaknesses
- 9.12 Syensqo SA
  - 9.12.1 Syensqo SA Details
  - 9.12.2 Syensqo SA Major Business
  - 9.12.3 Syensqo SA Training Cluster Dielectric Coolant Product and Services
  - 9.12.4 Syensqo SA Training Cluster Dielectric Coolant Production, Price, Value, Gross

## Margin and Market Share (2021-2026)

### 9.12.5 Syensqo SA Recent Developments/Updates

### 9.12.6 Syensqo SA Competitive Strengths & Weaknesses

## 9.13 Inventec Performance Chemicals

### 9.13.1 Inventec Performance Chemicals Details

### 9.13.2 Inventec Performance Chemicals Major Business

### 9.13.3 Inventec Performance Chemicals Training Cluster Dielectric Coolant Product and Services

### 9.13.4 Inventec Performance Chemicals Training Cluster Dielectric Coolant Production, Price, Value, Gross Margin and Market Share (2021-2026)

### 9.13.5 Inventec Performance Chemicals Recent Developments/Updates

### 9.13.6 Inventec Performance Chemicals Competitive Strengths & Weaknesses

## 9.14 Submer Technologies S.L.

### 9.14.1 Submer Technologies S.L. Details

### 9.14.2 Submer Technologies S.L. Major Business

### 9.14.3 Submer Technologies S.L. Training Cluster Dielectric Coolant Product and Services

### 9.14.4 Submer Technologies S.L. Training Cluster Dielectric Coolant Production, Price, Value, Gross Margin and Market Share (2021-2026)

### 9.14.5 Submer Technologies S.L. Recent Developments/Updates

### 9.14.6 Submer Technologies S.L. Competitive Strengths & Weaknesses

## 9.15 Lubrizol Corporation

### 9.15.1 Lubrizol Corporation Details

### 9.15.2 Lubrizol Corporation Major Business

### 9.15.3 Lubrizol Corporation Training Cluster Dielectric Coolant Product and Services

### 9.15.4 Lubrizol Corporation Training Cluster Dielectric Coolant Production, Price, Value, Gross Margin and Market Share (2021-2026)

### 9.15.5 Lubrizol Corporation Recent Developments/Updates

### 9.15.6 Lubrizol Corporation Competitive Strengths & Weaknesses

## 9.16 Perstorp AB

### 9.16.1 Perstorp AB Details

### 9.16.2 Perstorp AB Major Business

### 9.16.3 Perstorp AB Training Cluster Dielectric Coolant Product and Services

### 9.16.4 Perstorp AB Training Cluster Dielectric Coolant Production, Price, Value, Gross Margin and Market Share (2021-2026)

### 9.16.5 Perstorp AB Recent Developments/Updates

### 9.16.6 Perstorp AB Competitive Strengths & Weaknesses

## 9.17 FUCHS SE

### 9.17.1 FUCHS SE Details

- 9.17.2 FUCHS SE Major Business
- 9.17.3 FUCHS SE Training Cluster Dielectric Coolant Product and Services
- 9.17.4 FUCHS SE Training Cluster Dielectric Coolant Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.17.5 FUCHS SE Recent Developments/Updates
- 9.17.6 FUCHS SE Competitive Strengths & Weaknesses
- 9.18 ENEOS Corporation
  - 9.18.1 ENEOS Corporation Details
  - 9.18.2 ENEOS Corporation Major Business
  - 9.18.3 ENEOS Corporation Training Cluster Dielectric Coolant Product and Services
  - 9.18.4 ENEOS Corporation Training Cluster Dielectric Coolant Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.18.5 ENEOS Corporation Recent Developments/Updates
  - 9.18.6 ENEOS Corporation Competitive Strengths & Weaknesses

## **10 INDUSTRY CHAIN ANALYSIS**

- 10.1 Training Cluster Dielectric Coolant Industry Chain
- 10.2 Training Cluster Dielectric Coolant Upstream Analysis
  - 10.2.1 Training Cluster Dielectric Coolant Core Raw Materials
  - 10.2.2 Main Manufacturers of Training Cluster Dielectric Coolant Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Training Cluster Dielectric Coolant Production Mode
- 10.6 Training Cluster Dielectric Coolant Procurement Model
- 10.7 Training Cluster Dielectric Coolant Industry Sales Model and Sales Channels
  - 10.7.1 Training Cluster Dielectric Coolant Sales Model
  - 10.7.2 Training Cluster Dielectric Coolant 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 Training Cluster Dielectric Coolant Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Training Cluster Dielectric Coolant Production Value by Region (2021-2026) & (USD Million)

Table 3. World Training Cluster Dielectric Coolant Production Value by Region (2027-2032) & (USD Million)

Table 4. World Training Cluster Dielectric Coolant Production Value Market Share by Region (2021-2026)

Table 5. World Training Cluster Dielectric Coolant Production Value Market Share by Region (2027-2032)

Table 6. World Training Cluster Dielectric Coolant Production by Region (2021-2026) & (K Gallon)

Table 7. World Training Cluster Dielectric Coolant Production by Region (2027-2032) & (K Gallon)

Table 8. World Training Cluster Dielectric Coolant Production Market Share by Region (2021-2026)

Table 9. World Training Cluster Dielectric Coolant Production Market Share by Region (2027-2032)

Table 10. World Training Cluster Dielectric Coolant Average Price by Region (2021-2026) & (USD/Gallon)

Table 11. World Training Cluster Dielectric Coolant Average Price by Region (2027-2032) & (USD/Gallon)

Table 12. Training Cluster Dielectric Coolant Major Market Trends

Table 13. World Training Cluster Dielectric Coolant Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Gallon)

Table 14. World Training Cluster Dielectric Coolant Consumption by Region (2021-2026) & (K Gallon)

Table 15. World Training Cluster Dielectric Coolant Consumption Forecast by Region (2027-2032) & (K Gallon)

Table 16. World Training Cluster Dielectric Coolant Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Training Cluster Dielectric Coolant Producers in 2025

Table 18. World Training Cluster Dielectric Coolant Production by Manufacturer (2021-2026) & (K Gallon)

Table 19. Production Market Share of Key Training Cluster Dielectric Coolant Producers in 2025

Table 20. World Training Cluster Dielectric Coolant Average Price by Manufacturer (2021-2026) & (USD/Gallon)

Table 21. Global Training Cluster Dielectric Coolant Company Evaluation Quadrant

Table 22. World Training Cluster Dielectric Coolant Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Training Cluster Dielectric Coolant Production Site of Key Manufacturer

Table 24. Training Cluster Dielectric Coolant Market: Company Product Type Footprint

Table 25. Training Cluster Dielectric Coolant Market: Company Product Application Footprint

Table 26. Training Cluster Dielectric Coolant Competitive Factors

Table 27. Training Cluster Dielectric Coolant New Entrant and Capacity Expansion Plans

Table 28. Training Cluster Dielectric Coolant Mergers & Acquisitions Activity

Table 29. United States VS China Training Cluster Dielectric Coolant Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Training Cluster Dielectric Coolant Production Comparison, (2021 & 2025 & 2032) & (K Gallon)

Table 31. United States VS China Training Cluster Dielectric Coolant Consumption Comparison, (2021 & 2025 & 2032) & (K Gallon)

Table 32. United States Based Training Cluster Dielectric Coolant Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Training Cluster Dielectric Coolant Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Training Cluster Dielectric Coolant Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Training Cluster Dielectric Coolant Production (2021-2026) & (K Gallon)

Table 36. United States Based Manufacturers Training Cluster Dielectric Coolant Production Market Share (2021-2026)

Table 37. China Based Training Cluster Dielectric Coolant Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Training Cluster Dielectric Coolant Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Training Cluster Dielectric Coolant Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Training Cluster Dielectric Coolant Production,

(2021-2026) & (K Gallon)

Table 41. China Based Manufacturers Training Cluster Dielectric Coolant Production Market Share (2021-2026)

Table 42. Rest of World Based Training Cluster Dielectric Coolant Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Training Cluster Dielectric Coolant Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Training Cluster Dielectric Coolant Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Training Cluster Dielectric Coolant Production, (2021-2026) & (K Gallon)

Table 46. Rest of World Based Manufacturers Training Cluster Dielectric Coolant Production Market Share (2021-2026)

Table 47. World Training Cluster Dielectric Coolant Production Value by Cooling Phase State, (USD Million), 2021 & 2025 & 2032

Table 48. World Training Cluster Dielectric Coolant Production by Cooling Phase State (2021-2026) & (K Gallon)

Table 49. World Training Cluster Dielectric Coolant Production by Cooling Phase State (2027-2032) & (K Gallon)

Table 50. World Training Cluster Dielectric Coolant Production Value by Cooling Phase State (2021-2026) & (USD Million)

Table 51. World Training Cluster Dielectric Coolant Production Value by Cooling Phase State (2027-2032) & (USD Million)

Table 52. World Training Cluster Dielectric Coolant Average Price by Cooling Phase State (2021-2026) & (USD/Gallon)

Table 53. World Training Cluster Dielectric Coolant Average Price by Cooling Phase State (2027-2032) & (USD/Gallon)

Table 54. World Training Cluster Dielectric Coolant Production Value by Material System, (USD Million), 2021 & 2025 & 2032

Table 55. World Training Cluster Dielectric Coolant Production by Material System (2021-2026) & (K Gallon)

Table 56. World Training Cluster Dielectric Coolant Production by Material System (2027-2032) & (K Gallon)

Table 57. World Training Cluster Dielectric Coolant Production Value by Material System (2021-2026) & (USD Million)

Table 58. World Training Cluster Dielectric Coolant Production Value by Material System (2027-2032) & (USD Million)

Table 59. World Training Cluster Dielectric Coolant Average Price by Material System (2021-2026) & (USD/Gallon)

Table 60. World Training Cluster Dielectric Coolant Average Price by Material System (2027-2032) & (USD/Gallon)

Table 61. World Training Cluster Dielectric Coolant Production Value by Flash Point Grade, (USD Million), 2021 & 2025 & 2032

Table 62. World Training Cluster Dielectric Coolant Production by Flash Point Grade (2021-2026) & (K Gallon)

Table 63. World Training Cluster Dielectric Coolant Production by Flash Point Grade (2027-2032) & (K Gallon)

Table 64. World Training Cluster Dielectric Coolant Production Value by Flash Point Grade (2021-2026) & (USD Million)

Table 65. World Training Cluster Dielectric Coolant Production Value by Flash Point Grade (2027-2032) & (USD Million)

Table 66. World Training Cluster Dielectric Coolant Average Price by Flash Point Grade (2021-2026) & (USD/Gallon)

Table 67. World Training Cluster Dielectric Coolant Average Price by Flash Point Grade (2027-2032) & (USD/Gallon)

Table 68. World Training Cluster Dielectric Coolant Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Training Cluster Dielectric Coolant Production by Application (2021-2026) & (K Gallon)

Table 70. World Training Cluster Dielectric Coolant Production by Application (2027-2032) & (K Gallon)

Table 71. World Training Cluster Dielectric Coolant Production Value by Application (2021-2026) & (USD Million)

Table 72. World Training Cluster Dielectric Coolant Production Value by Application (2027-2032) & (USD Million)

Table 73. World Training Cluster Dielectric Coolant Average Price by Application (2021-2026) & (USD/Gallon)

Table 74. World Training Cluster Dielectric Coolant Average Price by Application (2027-2032) & (USD/Gallon)

Table 75. Shell plc Basic Information, Manufacturing Base and Competitors

Table 76. Shell plc Major Business

Table 77. Shell plc Training Cluster Dielectric Coolant Product and Services

Table 78. Shell plc Training Cluster Dielectric Coolant Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Shell plc Recent Developments/Updates

Table 80. Shell plc Competitive Strengths & Weaknesses

Table 81. Exxon Mobil Corporation Basic Information, Manufacturing Base and

## Competitors

Table 82. Exxon Mobil Corporation Major Business

Table 83. Exxon Mobil Corporation Training Cluster Dielectric Coolant Product and Services

Table 84. Exxon Mobil Corporation Training Cluster Dielectric Coolant Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Exxon Mobil Corporation Recent Developments/Updates

Table 86. Exxon Mobil Corporation Competitive Strengths & Weaknesses

Table 87. The Chemours Company Basic Information, Manufacturing Base and Competitors

Table 88. The Chemours Company Major Business

Table 89. The Chemours Company Training Cluster Dielectric Coolant Product and Services

Table 90. The Chemours Company Training Cluster Dielectric Coolant Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. The Chemours Company Recent Developments/Updates

Table 92. The Chemours Company Competitive Strengths & Weaknesses

Table 93. Dow Inc. Basic Information, Manufacturing Base and Competitors

Table 94. Dow Inc. Major Business

Table 95. Dow Inc. Training Cluster Dielectric Coolant Product and Services

Table 96. Dow Inc. Training Cluster Dielectric Coolant Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Dow Inc. Recent Developments/Updates

Table 98. Dow Inc. Competitive Strengths & Weaknesses

Table 99. bp p.l.c. Basic Information, Manufacturing Base and Competitors

Table 100. bp p.l.c. Major Business

Table 101. bp p.l.c. Training Cluster Dielectric Coolant Product and Services

Table 102. bp p.l.c. Training Cluster Dielectric Coolant Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. bp p.l.c. Recent Developments/Updates

Table 104. bp p.l.c. Competitive Strengths & Weaknesses

Table 105. TotalEnergies SE Basic Information, Manufacturing Base and Competitors

Table 106. TotalEnergies SE Major Business

Table 107. TotalEnergies SE Training Cluster Dielectric Coolant Product and Services

Table 108. TotalEnergies SE Training Cluster Dielectric Coolant Production (K Gallon),

Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. TotalEnergies SE Recent Developments/Updates

Table 110. TotalEnergies SE Competitive Strengths & Weaknesses

Table 111. Engineered Fluids, Inc. Basic Information, Manufacturing Base and Competitors

Table 112. Engineered Fluids, Inc. Major Business

Table 113. Engineered Fluids, Inc. Training Cluster Dielectric Coolant Product and Services

Table 114. Engineered Fluids, Inc. Training Cluster Dielectric Coolant Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Engineered Fluids, Inc. Recent Developments/Updates

Table 116. Engineered Fluids, Inc. Competitive Strengths & Weaknesses

Table 117. SK enmove Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 118. SK enmove Co., Ltd. Major Business

Table 119. SK enmove Co., Ltd. Training Cluster Dielectric Coolant Product and Services

Table 120. SK enmove Co., Ltd. Training Cluster Dielectric Coolant Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. SK enmove Co., Ltd. Recent Developments/Updates

Table 122. SK enmove Co., Ltd. Competitive Strengths & Weaknesses

Table 123. GS Caltex Corporation Basic Information, Manufacturing Base and Competitors

Table 124. GS Caltex Corporation Major Business

Table 125. GS Caltex Corporation Training Cluster Dielectric Coolant Product and Services

Table 126. GS Caltex Corporation Training Cluster Dielectric Coolant Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. GS Caltex Corporation Recent Developments/Updates

Table 128. GS Caltex Corporation Competitive Strengths & Weaknesses

Table 129. S-OIL Corporation Basic Information, Manufacturing Base and Competitors

Table 130. S-OIL Corporation Major Business

Table 131. S-OIL Corporation Training Cluster Dielectric Coolant Product and Services

Table 132. S-OIL Corporation Training Cluster Dielectric Coolant Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 133. S-OIL Corporation Recent Developments/Updates

Table 134. S-OIL Corporation Competitive Strengths & Weaknesses

Table 135. Cargill, Incorporated Basic Information, Manufacturing Base and Competitors

Table 136. Cargill, Incorporated Major Business

Table 137. Cargill, Incorporated Training Cluster Dielectric Coolant Product and Services

Table 138. Cargill, Incorporated Training Cluster Dielectric Coolant Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Cargill, Incorporated Recent Developments/Updates

Table 140. Cargill, Incorporated Competitive Strengths & Weaknesses

Table 141. Syensqo SA Basic Information, Manufacturing Base and Competitors

Table 142. Syensqo SA Major Business

Table 143. Syensqo SA Training Cluster Dielectric Coolant Product and Services

Table 144. Syensqo SA Training Cluster Dielectric Coolant Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Syensqo SA Recent Developments/Updates

Table 146. Syensqo SA Competitive Strengths & Weaknesses

Table 147. Inventec Performance Chemicals Basic Information, Manufacturing Base and Competitors

Table 148. Inventec Performance Chemicals Major Business

Table 149. Inventec Performance Chemicals Training Cluster Dielectric Coolant Product and Services

Table 150. Inventec Performance Chemicals Training Cluster Dielectric Coolant Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Inventec Performance Chemicals Recent Developments/Updates

Table 152. Inventec Performance Chemicals Competitive Strengths & Weaknesses

Table 153. Submer Technologies S.L. Basic Information, Manufacturing Base and Competitors

Table 154. Submer Technologies S.L. Major Business

Table 155. Submer Technologies S.L. Training Cluster Dielectric Coolant Product and Services

Table 156. Submer Technologies S.L. Training Cluster Dielectric Coolant Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Submer Technologies S.L. Recent Developments/Updates

Table 158. Submer Technologies S.L. Competitive Strengths & Weaknesses

Table 159. Lubrizol Corporation Basic Information, Manufacturing Base and Competitors

Table 160. Lubrizol Corporation Major Business

Table 161. Lubrizol Corporation Training Cluster Dielectric Coolant Product and Services

Table 162. Lubrizol Corporation Training Cluster Dielectric Coolant Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Lubrizol Corporation Recent Developments/Updates

Table 164. Lubrizol Corporation Competitive Strengths & Weaknesses

Table 165. Perstorp AB Basic Information, Manufacturing Base and Competitors

Table 166. Perstorp AB Major Business

Table 167. Perstorp AB Training Cluster Dielectric Coolant Product and Services

Table 168. Perstorp AB Training Cluster Dielectric Coolant Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. Perstorp AB Recent Developments/Updates

Table 170. Perstorp AB Competitive Strengths & Weaknesses

Table 171. FUCHS SE Basic Information, Manufacturing Base and Competitors

Table 172. FUCHS SE Major Business

Table 173. FUCHS SE Training Cluster Dielectric Coolant Product and Services

Table 174. FUCHS SE Training Cluster Dielectric Coolant Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 175. FUCHS SE Recent Developments/Updates

Table 176. FUCHS SE Competitive Strengths & Weaknesses

Table 177. ENEOS Corporation Basic Information, Manufacturing Base and Competitors

Table 178. ENEOS Corporation Major Business

Table 179. ENEOS Corporation Training Cluster Dielectric Coolant Product and Services

Table 180. ENEOS Corporation Training Cluster Dielectric Coolant Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 181. ENEOS Corporation Recent Developments/Updates

Table 182. ENEOS Corporation Competitive Strengths & Weaknesses

Table 183. Global Key Players of Training Cluster Dielectric Coolant Upstream (Raw

Materials)

Table 184. Global Training Cluster Dielectric Coolant Typical Customers

Table 185. Training Cluster Dielectric Coolant Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. Training Cluster Dielectric Coolant Picture

Figure 2. World Training Cluster Dielectric Coolant Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Training Cluster Dielectric Coolant Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Training Cluster Dielectric Coolant Production (2021-2032) & (K Gallon)

Figure 5. World Training Cluster Dielectric Coolant Average Price (2021-2032) & (USD/Gallon)

Figure 6. World Training Cluster Dielectric Coolant Production Value Market Share by Region (2021-2032)

Figure 7. World Training Cluster Dielectric Coolant Production Market Share by Region (2021-2032)

Figure 8. North America Training Cluster Dielectric Coolant Production (2021-2032) & (K Gallon)

Figure 9. Europe Training Cluster Dielectric Coolant Production (2021-2032) & (K Gallon)

Figure 10. Japan Training Cluster Dielectric Coolant Production (2021-2032) & (K Gallon)

Figure 11. South Korea Training Cluster Dielectric Coolant Production (2021-2032) & (K Gallon)

Figure 12. Training Cluster Dielectric Coolant Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Training Cluster Dielectric Coolant Consumption (2021-2032) & (K Gallon)

Figure 15. World Training Cluster Dielectric Coolant Consumption Market Share by Region (2021-2032)

Figure 16. United States Training Cluster Dielectric Coolant Consumption (2021-2032) & (K Gallon)

Figure 17. China Training Cluster Dielectric Coolant Consumption (2021-2032) & (K Gallon)

Figure 18. Europe Training Cluster Dielectric Coolant Consumption (2021-2032) & (K Gallon)

Figure 19. Japan Training Cluster Dielectric Coolant Consumption (2021-2032) & (K Gallon)

Figure 20. South Korea Training Cluster Dielectric Coolant Consumption (2021-2032) &

(K Gallon)

Figure 21. ASEAN Training Cluster Dielectric Coolant Consumption (2021-2032) & (K Gallon)

Figure 22. India Training Cluster Dielectric Coolant Consumption (2021-2032) & (K Gallon)

Figure 23. Producer Shipments of Training Cluster Dielectric Coolant by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Training Cluster Dielectric Coolant Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Training Cluster Dielectric Coolant Markets in 2025

Figure 26. United States VS China: Training Cluster Dielectric Coolant Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Training Cluster Dielectric Coolant Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Training Cluster Dielectric Coolant Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Training Cluster Dielectric Coolant Production Market Share 2025

Figure 30. China Based Manufacturers Training Cluster Dielectric Coolant Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Training Cluster Dielectric Coolant Production Market Share 2025

Figure 32. World Training Cluster Dielectric Coolant Production Value by Cooling Phase State, (USD Million), 2021 & 2025 & 2032

Figure 33. World Training Cluster Dielectric Coolant Production Value Market Share by Cooling Phase State in 2025

Figure 34. Single-Phase Dielectric Coolant

Figure 35. Two-Phase Dielectric Coolant

Figure 36. Other

Figure 37. World Training Cluster Dielectric Coolant Production Market Share by Cooling Phase State (2021-2032)

Figure 38. World Training Cluster Dielectric Coolant Production Value Market Share by Cooling Phase State (2021-2032)

Figure 39. World Training Cluster Dielectric Coolant Average Price by Cooling Phase State (2021-2032) & (USD/Gallon)

Figure 40. World Training Cluster Dielectric Coolant Production Value by Material System, (USD Million), 2021 & 2025 & 2032

Figure 41. World Training Cluster Dielectric Coolant Production Value Market Share by

## Material System in 2025

Figure 42. Synthetic Hydrocarbon Dielectric Coolant

Figure 43. Mineral Oil Dielectric Coolant

Figure 44. Fluorinated Dielectric Coolant

Figure 45. Silicone-Based Dielectric Coolant

Figure 46. Natural Ester Dielectric Coolant

Figure 47. Synthetic Ester Dielectric Coolant

Figure 48. Other

Figure 49. Other

Figure 50. World Training Cluster Dielectric Coolant Production Market Share by Material System (2021-2032)

Figure 51. World Training Cluster Dielectric Coolant Production Value Market Share by Material System (2021-2032)

Figure 52. World Training Cluster Dielectric Coolant Average Price by Material System (2021-2032) & (USD/Gallon)

Figure 53. World Training Cluster Dielectric Coolant Production Value by Flash Point Grade, (USD Million), 2021 & 2025 & 2032

Figure 54. World Training Cluster Dielectric Coolant Production Value Market Share by Flash Point Grade in 2025

Figure 55. No-Flash-Point Dielectric Coolant

Figure 56. Normal-Flash-Point Dielectric Coolant

Figure 57. High-Flash-Point Dielectric Coolant

Figure 58. Ultra-High-Flash-Point Dielectric Coolant

Figure 59. World Training Cluster Dielectric Coolant Production Market Share by Flash Point Grade (2021-2032)

Figure 60. World Training Cluster Dielectric Coolant Production Value Market Share by Flash Point Grade (2021-2032)

Figure 61. World Training Cluster Dielectric Coolant Average Price by Flash Point Grade (2021-2032) & (USD/Gallon)

Figure 62. World Training Cluster Dielectric Coolant Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 63. World Training Cluster Dielectric Coolant Production Value Market Share by Application in 2025

Figure 64. GPU Training Server

Figure 65. AI Accelerator Full Rack

Figure 66. High-Density HPC Cluster

Figure 67. Other

Figure 68. World Training Cluster Dielectric Coolant Production Market Share by Application (2021-2032)

Figure 69. World Training Cluster Dielectric Coolant Production Value Market Share by Application (2021-2032)

Figure 70. World Training Cluster Dielectric Coolant Average Price by Application (2021-2032) & (USD/Gallon)

Figure 71. Training Cluster Dielectric Coolant Industry Chain

Figure 72. Training Cluster Dielectric Coolant Procurement Model

Figure 73. Training Cluster Dielectric Coolant Sales Model

Figure 74. Training Cluster Dielectric Coolant Sales Channels, Direct Sales, and Distribution

Figure 75. Methodology

Figure 76. Research Process and Data Source

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