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

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Abstracts

The global Two-Phase Liquid Immersion Cooling System market size is expected to reach $ 1024 million by 2032, rising at a market growth of 13.5% CAGR during the forecast period (2026-2032).

Two-phase liquid immersion cooling system is an advanced thermal management technology that involves fully submerging high-power electronic equipment—such as servers—in a sealed tank containing a non-conductive, low-boiling-point (typically below 50°C) dielectric fluid (e.g., fluorinated fluid). It achieves exceptional heat dissipation efficiency by leveraging the principle of "latent heat of phase change," where the liquid absorbs vast amounts of heat as it boils and vaporizes. The resulting vapor rises to the top of the tank, where it is cooled and condensed into droplets by an internal condenser before falling back into the liquid under gravity, creating a natural, passive circulation loop that requires no pumping. With a cooling capacity 10 to 100 times that of single-phase cooling, this technology can drive data center Power Usage Effectiveness (PUE) below 1.05, making it particularly well-suited for addressing the thermal challenges of ultra-high power density environments such as AI clusters and high-performance computing.

Key Findings

Two-Phase Liquid Immersion Cooling System is mainly deployed in AI computing and high-density data center applications

AI servers and HPC platforms represent the primary demand segments for two-phase immersion cooling

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Fluorinated fluid systems remain the mainstream commercial technology route

High-power density computing is accelerating adoption of immersion cooling solutions

The market is transitioning from technology validation toward commercial deployment

Market Trends

The Two-Phase Liquid Immersion Cooling System industry is moving toward higher efficiency, larger-scale deployment and compatibility with next-generation AI computing infrastructure. As GPU power consumption and rack-level heat density continue increasing, traditional air cooling and conventional liquid cooling solutions face limitations in thermal performance. Two-phase immersion cooling provides a pathway for supporting higher computing density through phase-change heat transfer. Future development is focused on environmentally sustainable cooling fluids, higher-capacity cooling modules, improved server compatibility, intelligent thermal management and integration with AI data center architectures.

Market Dynamics

Drivers

The rapid expansion of artificial intelligence, large-scale AI models, high-performance computing and cloud data centers is creating strong demand for advanced cooling technologies. AI servers equipped with high-performance GPUs and accelerators generate significantly higher thermal loads, encouraging data center operators to adopt immersion cooling solutions capable of supporting higher rack power density and improved energy efficiency.

Restraints

The commercialization of Two-Phase Liquid Immersion Cooling System is constrained by high initial deployment costs, cooling fluid expenses, equipment compatibility

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requirements and ecosystem maturity. Compared with traditional cooling methods, immersion cooling requires modifications to server hardware, operational processes and maintenance systems, increasing adoption complexity for existing data centers.

Opportunities

The growth of AI infrastructure, hyperscale data centers and green computing initiatives provides significant opportunities for two-phase immersion cooling. Increasing deployment of GPU clusters, AI training platforms and high-performance computing facilities creates demand for cooling systems capable of supporting higher thermal loads. Development of low-GWP cooling fluids and standardized immersion cooling platforms may further expand market adoption.

Challenges

The industry faces challenges related to cooling fluid sustainability, standardization, long-term reliability validation and integration with existing data center infrastructure. Suppliers need to improve system interoperability, reduce lifecycle costs and establish broader ecosystem cooperation to accelerate large-scale commercial adoption.

Industry Chain Analysis

The Two-Phase Liquid Immersion Cooling System industry chain consists of upstream suppliers providing dielectric cooling fluids, heat exchange materials, pumps, valves, sensors, control components and thermal management materials. The midstream segment includes immersion cooling system design, cooling tank manufacturing, condensation system integration, monitoring software development and deployment services. Downstream applications include AI data centers, cloud computing facilities, HPC centers, scientific research platforms and enterprise computing infrastructure.

The main value creation process focuses on cooling efficiency optimization, fluid technology, system reliability, thermal control capability and integration with computing infrastructure. Cooling fluids and heat dissipation components represent important cost factors, while system engineering capability, deployment experience and ecosystem cooperation determine competitive differentiation.

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Segment Insights

Two-Phase Liquid Immersion Cooling System can be segmented by cooling fluid type, system architecture, deployment scale and application scenario. By cooling fluid technology, fluorinated fluid-based systems currently represent the main commercial route due to their electrical insulation characteristics, thermal stability and compatibility with high-performance computing equipment. Low-GWP alternative fluid solutions are emerging as an important future direction driven by sustainability requirements.

By system structure, open bath systems and closed-loop systems represent the two major architectures. Rack-level and modular immersion cooling systems are gaining attention because they enable flexible deployment for AI computing clusters. From the application perspective, AI computing infrastructure represents the fastest-growing segment, followed by HPC and cloud data center applications.

Downstream Market Opportunities

Two-Phase Liquid Immersion Cooling System mainly serves industries requiring high computing density and efficient thermal management. AI infrastructure is becoming the most important application area due to increasing GPU power consumption and large-scale model computing requirements. Additional opportunities exist in scientific computing, industrial simulation, cloud platforms and enterprise data centers where higher energy efficiency and computing density are required.

Regional Insights

North America represents one of the most important markets for Two-Phase Liquid Immersion Cooling System, supported by strong AI infrastructure investment, advanced cloud computing deployment and large-scale data center development. The region has significant demand from hyperscale computing operators and technology companies focusing on next-generation AI infrastructure.

Asia Pacific represents a major manufacturing and deployment region, supported by strong semiconductor supply chains, server manufacturing capabilities and expanding digital infrastructure investment. China, China Taiwan, Japan and South Korea have important roles in electronic manufacturing, computing hardware ecosystems and data center expansion. European markets show increasing interest driven by energy

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efficiency requirements and sustainable data center development.

Competitive Landscape Analysis

The Two-Phase Liquid Immersion Cooling System market is characterized by competition among specialized immersion cooling providers, thermal management companies, cooling fluid suppliers and data center infrastructure companies. System providers compete based on cooling performance, deployment experience, scalability, reliability and compatibility with AI computing platforms. Future competition is expected to center on system cost reduction, sustainable fluids, AI data center compatibility and large-scale deployment capability.

Report Scope

This report studies the global Two-Phase Liquid Immersion Cooling System demand, key companies, and key regions.

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

Highlights and key features of the study

Global Two-Phase Liquid Immersion Cooling System total market, 2021-2032, (USD Million)

Global Two-Phase Liquid Immersion Cooling System total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Two-Phase Liquid Immersion Cooling System total market, key domestic companies, and share, (USD Million)

Global Two-Phase Liquid Immersion Cooling System revenue by player,

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revenue and market share 2021-2026, (USD Million)

Global Two-Phase Liquid Immersion Cooling System total market by Type, CAGR, 2021-2032, (USD Million)

Global Two-Phase Liquid Immersion Cooling System total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Two-Phase Liquid Immersion Cooling System market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include LiquidStack, Green Revolution Cooling(GRC), ZutaCore, Parker Hannifin, Boyd Corporation, Vertiv, Delta Electronics, NTT, Gigabyte, Wiwynn, 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 Two-Phase Liquid Immersion Cooling System market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, 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 Two-Phase Liquid Immersion Cooling System Market, By Region:

United States

China

Europe

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Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Two-Phase Liquid Immersion Cooling System Market, Segmentation by Type:

Open Bath Two-Phase Immersion Cooling System

Closed-Loop Two-Phase Immersion Cooling System

Global Two-Phase Liquid Immersion Cooling System Market, Segmentation by Circulation Method:

Natural Circulation

Forced Circulation

Global Two-Phase Liquid Immersion Cooling System Market, Segmentation by Condensing Cooling Methods:

Built-In Coil Condensing Type

External Loop Condensing Type

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Global Two-Phase Liquid Immersion Cooling System Market, Segmentation by Application:

Cloud Data Centers

High-Performance Computing

Edge Computing

Others

Companies Profiled:

LiquidStack

Green Revolution Cooling(GRC)

ZutaCore

Parker Hannifin

Boyd Corporation

Vertiv

Delta Electronics

NTT

Gigabyte

Wiwynn

Advanced Cooling Technologies (ACT)

Xinhan Intelligent

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Key Questions Answered

1. How big is the global Two-Phase Liquid Immersion Cooling System market?
2. What is the demand of the global Two-Phase Liquid Immersion Cooling System market?
3. What is the year over year growth of the global Two-Phase Liquid Immersion Cooling System market?
4. What is the total value of the global Two-Phase Liquid Immersion Cooling System market?
5. Who are the Major Players in the global Two-Phase Liquid Immersion Cooling System market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

1.1 Two-Phase Liquid Immersion Cooling System Introduction
1.2 World Two-Phase Liquid Immersion Cooling System Market Size & Forecast (2021 & 2025 & 2032)
1.3 World Two-Phase Liquid Immersion Cooling System Total Market by Region (by Headquarter Location)
  1.3.1 World Two-Phase Liquid Immersion Cooling System Market Size by Region (2021-2032), (by Headquarter Location)
  1.3.2 United States Based Company Two-Phase Liquid Immersion Cooling System Revenue (2021-2032)
  1.3.3 China Based Company Two-Phase Liquid Immersion Cooling System Revenue (2021-2032)
  1.3.4 Europe Based Company Two-Phase Liquid Immersion Cooling System Revenue (2021-2032)
  1.3.5 Japan Based Company Two-Phase Liquid Immersion Cooling System Revenue (2021-2032)
  1.3.6 South Korea Based Company Two-Phase Liquid Immersion Cooling System Revenue (2021-2032)
  1.3.7 ASEAN Based Company Two-Phase Liquid Immersion Cooling System Revenue (2021-2032)
  1.3.8 India Based Company Two-Phase Liquid Immersion Cooling System Revenue (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 Two-Phase Liquid Immersion Cooling System Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 Major Market Trends

2 DEMAND SUMMARY

2.1 World Two-Phase Liquid Immersion Cooling System Consumption Value (2021-2032)
2.2 World Two-Phase Liquid Immersion Cooling System Consumption Value by Region
  2.2.1 World Two-Phase Liquid Immersion Cooling System Consumption Value by Region (2021-2026)
  2.2.2 World Two-Phase Liquid Immersion Cooling System Consumption Value Forecast by Region (2027-2032)

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2.3 United States Two-Phase Liquid Immersion Cooling System Consumption Value (2021-2032)
2.4 China Two-Phase Liquid Immersion Cooling System Consumption Value (2021-2032)
2.5 Europe Two-Phase Liquid Immersion Cooling System Consumption Value (2021-2032)
2.6 Japan Two-Phase Liquid Immersion Cooling System Consumption Value (2021-2032)
2.7 South Korea Two-Phase Liquid Immersion Cooling System Consumption Value (2021-2032)
2.8 ASEAN Two-Phase Liquid Immersion Cooling System Consumption Value (2021-2032)
2.9 India Two-Phase Liquid Immersion Cooling System Consumption Value (2021-2032)

3 WORLD TWO-PHASE LIQUID IMMERSION COOLING SYSTEM COMPANIES COMPETITIVE ANALYSIS

3.1 World Two-Phase Liquid Immersion Cooling System Revenue by Player (2021-2026)
3.2 Industry Rank and Concentration Rate (CR)
  3.2.1 Global Two-Phase Liquid Immersion Cooling System Industry Rank of Major Players
  3.2.2 Global Concentration Ratios (CR4) for Two-Phase Liquid Immersion Cooling System in 2025
  3.2.3 Global Concentration Ratios (CR8) for Two-Phase Liquid Immersion Cooling System in 2025
3.3 Two-Phase Liquid Immersion Cooling System Company Evaluation Quadrant
3.4 Two-Phase Liquid Immersion Cooling System Market: Overall Company Footprint Analysis
  3.4.1 Two-Phase Liquid Immersion Cooling System Market: Region Footprint
  3.4.2 Two-Phase Liquid Immersion Cooling System Market: Company Product Type Footprint
  3.4.3 Two-Phase Liquid Immersion Cooling System Market: Company Product Application Footprint
3.5 Competitive Environment
  3.5.1 Historical Structure of the Industry
  3.5.2 Barriers of Market Entry
  3.5.3 Factors of Competition

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info@marketpublishers.com

3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: Two-Phase Liquid Immersion Cooling System Revenue Comparison (by Headquarter Location)
  4.1.1 United States VS China: Two-Phase Liquid Immersion Cooling System Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)
  4.1.2 United States VS China: Two-Phase Liquid Immersion Cooling System Revenue Market Share Comparison (2021 & 2025 & 2032)
4.2 United States Based Companies VS China Based Companies: Two-Phase Liquid Immersion Cooling System Consumption Value Comparison
  4.2.1 United States VS China: Two-Phase Liquid Immersion Cooling System Consumption Value Comparison (2021 & 2025 & 2032)
  4.2.2 United States VS China: Two-Phase Liquid Immersion Cooling System Consumption Value Market Share Comparison (2021 & 2025 & 2032)
4.3 United States Based Two-Phase Liquid Immersion Cooling System Companies and Market Share, 2021-2026
  4.3.1 United States Based Two-Phase Liquid Immersion Cooling System Companies, Headquarters (States, Country)
  4.3.2 United States Based Companies Two-Phase Liquid Immersion Cooling System Revenue, (2021-2026)
4.4 China Based Companies Two-Phase Liquid Immersion Cooling System Revenue and Market Share, 2021-2026
  4.4.1 China Based Two-Phase Liquid Immersion Cooling System Companies, Company Headquarters (Province, Country)
  4.4.2 China Based Companies Two-Phase Liquid Immersion Cooling System Revenue, (2021-2026)
4.5 Rest of World Based Two-Phase Liquid Immersion Cooling System Companies and Market Share, 2021-2026
  4.5.1 Rest of World Based Two-Phase Liquid Immersion Cooling System Companies, Headquarters (Province, Country)
  4.5.2 Rest of World Based Companies Two-Phase Liquid Immersion Cooling System Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Two-Phase Liquid Immersion Cooling System Market Size Overview by Type:

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2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 Open Bath Two-Phase Immersion Cooling System
5.2.2 Closed-Loop Two-Phase Immersion Cooling System
5.3 Market Segment by Type
5.3.1 World Two-Phase Liquid Immersion Cooling System Market Size by Type (2021-2026)
5.3.2 World Two-Phase Liquid Immersion Cooling System Market Size by Type (2027-2032)
5.3.3 World Two-Phase Liquid Immersion Cooling System Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY CIRCULATION METHOD

6.1 World Two-Phase Liquid Immersion Cooling System Market Size Overview by Circulation Method: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Circulation Method
6.2.1 Natural Circulation
6.2.2 Forced Circulation
6.3 Market Segment by Circulation Method
6.3.1 World Two-Phase Liquid Immersion Cooling System Market Size by Circulation Method (2021-2026)
6.3.2 World Two-Phase Liquid Immersion Cooling System Market Size by Circulation Method (2027-2032)
6.3.3 World Two-Phase Liquid Immersion Cooling System Market Size Market Share by Circulation Method (2027-2032)

7 MARKET ANALYSIS BY CONDENSING COOLING METHODS

7.1 World Two-Phase Liquid Immersion Cooling System Market Size Overview by Condensing Cooling Methods: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Condensing Cooling Methods
7.2.1 Built-In Coil Condensing Type
7.2.2 External Loop Condensing Type
7.3 Market Segment by Condensing Cooling Methods
7.3.1 World Two-Phase Liquid Immersion Cooling System Market Size by Condensing Cooling Methods (2021-2026)
7.3.2 World Two-Phase Liquid Immersion Cooling System Market Size by Condensing Cooling Methods (2027-2032)

+357 96 030922
info@marketpublishers.com

7.3.3 World Two-Phase Liquid Immersion Cooling System Market Size Market Share by Condensing Cooling Methods (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Two-Phase Liquid Immersion Cooling System Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
8.2.1 Cloud Data Centers
8.2.2 High-Performance Computing
8.2.3 Edge Computing
8.2.4 Others
8.3 Market Segment by Application
8.3.1 World Two-Phase Liquid Immersion Cooling System Market Size by Application (2021-2026)
8.3.2 World Two-Phase Liquid Immersion Cooling System Market Size by Application (2027-2032)
8.3.3 World Two-Phase Liquid Immersion Cooling System Market Size Market Share by Application (2021-2032)

9 COMPANY PROFILES

9.1 LiquidStack
9.1.1 LiquidStack Details
9.1.2 LiquidStack Major Business
9.1.3 LiquidStack Two-Phase Liquid Immersion Cooling System Product and Services
9.1.4 LiquidStack Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026)
9.1.5 LiquidStack Recent Developments/Updates
9.1.6 LiquidStack Competitive Strengths & Weaknesses
9.2 Green Revolution Cooling(GRC)
9.2.1 Green Revolution Cooling(GRC) Details
9.2.2 Green Revolution Cooling(GRC) Major Business
9.2.3 Green Revolution Cooling(GRC) Two-Phase Liquid Immersion Cooling System Product and Services
9.2.4 Green Revolution Cooling(GRC) Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026)
9.2.5 Green Revolution Cooling(GRC) Recent Developments/Updates
9.2.6 Green Revolution Cooling(GRC) Competitive Strengths & Weaknesses

+357 96 030922
info@marketpublishers.com

9.3 ZutaCore
9.3.1 ZutaCore Details
9.3.2 ZutaCore Major Business
9.3.3 ZutaCore Two-Phase Liquid Immersion Cooling System Product and Services
9.3.4 ZutaCore Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026)
9.3.5 ZutaCore Recent Developments/Updates
9.3.6 ZutaCore Competitive Strengths & Weaknesses
9.4 Parker Hannifin
9.4.1 Parker Hannifin Details
9.4.2 Parker Hannifin Major Business
9.4.3 Parker Hannifin Two-Phase Liquid Immersion Cooling System Product and Services
9.4.4 Parker Hannifin Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026)
9.4.5 Parker Hannifin Recent Developments/Updates
9.4.6 Parker Hannifin Competitive Strengths & Weaknesses
9.5 Boyd Corporation
9.5.1 Boyd Corporation Details
9.5.2 Boyd Corporation Major Business
9.5.3 Boyd Corporation Two-Phase Liquid Immersion Cooling System Product and Services
9.5.4 Boyd Corporation Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026)
9.5.5 Boyd Corporation Recent Developments/Updates
9.5.6 Boyd Corporation Competitive Strengths & Weaknesses
9.6 Vertiv
9.6.1 Vertiv Details
9.6.2 Vertiv Major Business
9.6.3 Vertiv Two-Phase Liquid Immersion Cooling System Product and Services
9.6.4 Vertiv Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026)
9.6.5 Vertiv Recent Developments/Updates
9.6.6 Vertiv Competitive Strengths & Weaknesses
9.7 Delta Electronics
9.7.1 Delta Electronics Details
9.7.2 Delta Electronics Major Business
9.7.3 Delta Electronics Two-Phase Liquid Immersion Cooling System Product and Services

+357 96 030922
info@marketpublishers.com

9.7.4 Delta Electronics Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026)
9.7.5 Delta Electronics Recent Developments/Updates
9.7.6 Delta Electronics Competitive Strengths & Weaknesses
9.8 NTT
9.8.1 NTT Details
9.8.2 NTT Major Business
9.8.3 NTT Two-Phase Liquid Immersion Cooling System Product and Services
9.8.4 NTT Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026)
9.8.5 NTT Recent Developments/Updates
9.8.6 NTT Competitive Strengths & Weaknesses
9.9 Gigabyte
9.9.1 Gigabyte Details
9.9.2 Gigabyte Major Business
9.9.3 Gigabyte Two-Phase Liquid Immersion Cooling System Product and Services
9.9.4 Gigabyte Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026)
9.9.5 Gigabyte Recent Developments/Updates
9.9.6 Gigabyte Competitive Strengths & Weaknesses
9.10 Wiwynn
9.10.1 Wiwynn Details
9.10.2 Wiwynn Major Business
9.10.3 Wiwynn Two-Phase Liquid Immersion Cooling System Product and Services
9.10.4 Wiwynn Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026)
9.10.5 Wiwynn Recent Developments/Updates
9.10.6 Wiwynn Competitive Strengths & Weaknesses
9.11 Advanced Cooling Technologies (ACT)
9.11.1 Advanced Cooling Technologies (ACT) Details
9.11.2 Advanced Cooling Technologies (ACT) Major Business
9.11.3 Advanced Cooling Technologies (ACT) Two-Phase Liquid Immersion Cooling System Product and Services
9.11.4 Advanced Cooling Technologies (ACT) Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026)
9.11.5 Advanced Cooling Technologies (ACT) Recent Developments/Updates
9.11.6 Advanced Cooling Technologies (ACT) Competitive Strengths & Weaknesses
9.12 Xinhan Intelligent
9.12.1 Xinhan Intelligent Details

+357 96 030922
info@marketpublishers.com

9.12.2 Xinhan Intelligent Major Business
9.12.3 Xinhan Intelligent Two-Phase Liquid Immersion Cooling System Product and Services
9.12.4 Xinhan Intelligent Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026)
9.12.5 Xinhan Intelligent Recent Developments/Updates
9.12.6 Xinhan Intelligent Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Two-Phase Liquid Immersion Cooling System Industry Chain
10.2 Two-Phase Liquid Immersion Cooling System Upstream Analysis
10.3 Two-Phase Liquid Immersion Cooling System Midstream Analysis
10.4 Two-Phase Liquid Immersion Cooling System Downstream Analysis

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

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info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. World Two-Phase Liquid Immersion Cooling System Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Table 2. World Two-Phase Liquid Immersion Cooling System Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)
Table 3. World Two-Phase Liquid Immersion Cooling System Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)
Table 4. World Two-Phase Liquid Immersion Cooling System Revenue Market Share by Region (2021-2026), (by Headquarter Location)
Table 5. World Two-Phase Liquid Immersion Cooling System Revenue Market Share by Region (2027-2032), (by Headquarter Location)
Table 6. Major Market Trends
Table 7. World Two-Phase Liquid Immersion Cooling System Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)
Table 8. World Two-Phase Liquid Immersion Cooling System Consumption Value by Region (2021-2026) & (USD Million)
Table 9. World Two-Phase Liquid Immersion Cooling System Consumption Value Forecast by Region (2027-2032) & (USD Million)
Table 10. World Two-Phase Liquid Immersion Cooling System Revenue by Player (2021-2026) & (USD Million)
Table 11. Revenue Market Share of Key Two-Phase Liquid Immersion Cooling System Players in 2025
Table 12. World Two-Phase Liquid Immersion Cooling System Industry Rank of Major Player, Based on Revenue in 2025
Table 13. Global Two-Phase Liquid Immersion Cooling System Company Evaluation Quadrant
Table 14. Head Office of Key Two-Phase Liquid Immersion Cooling System Players
Table 15. Two-Phase Liquid Immersion Cooling System Market: Company Product Type Footprint
Table 16. Two-Phase Liquid Immersion Cooling System Market: Company Product Application Footprint
Table 17. Two-Phase Liquid Immersion Cooling System Mergers & Acquisitions Activity
Table 18. United States VS China Two-Phase Liquid Immersion Cooling System Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 19. United States VS China Two-Phase Liquid Immersion Cooling System Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

+357 96 030922
info@marketpublishers.com

Table 20. United States Based Two-Phase Liquid Immersion Cooling System Companies, Headquarters (States, Country)
Table 21. United States Based Companies Two-Phase Liquid Immersion Cooling System Revenue, (2021-2026) & (USD Million)
Table 22. United States Based Companies Two-Phase Liquid Immersion Cooling System Revenue Market Share (2021-2026)
Table 23. China Based Two-Phase Liquid Immersion Cooling System Companies, Headquarters (Province, Country)
Table 24. China Based Companies Two-Phase Liquid Immersion Cooling System Revenue, (2021-2026) & (USD Million)
Table 25. China Based Companies Two-Phase Liquid Immersion Cooling System Revenue Market Share (2021-2026)
Table 26. Rest of World Based Two-Phase Liquid Immersion Cooling System Companies, Headquarters (Province, Country)
Table 27. Rest of World Based Companies Two-Phase Liquid Immersion Cooling System Revenue (2021-2026) & (USD Million)
Table 28. Rest of World Based Companies Two-Phase Liquid Immersion Cooling System Revenue Market Share (2021-2026)
Table 29. World Two-Phase Liquid Immersion Cooling System Market Size by Type, (USD Million), 2021 & 2025 & 2032
Table 30. World Two-Phase Liquid Immersion Cooling System Market Size Value by Type (2021-2026) & (USD Million)
Table 31. World Two-Phase Liquid Immersion Cooling System Market Size by Type (2027-2032) & (USD Million)
Table 32. World Two-Phase Liquid Immersion Cooling System Market Size by Circulation Method, (USD Million), 2021 & 2025 & 2032
Table 33. World Two-Phase Liquid Immersion Cooling System Market Size Value by Circulation Method (2021-2026) & (USD Million)
Table 34. World Two-Phase Liquid Immersion Cooling System Market Size by Circulation Method (2027-2032) & (USD Million)
Table 35. World Two-Phase Liquid Immersion Cooling System Market Size by Condensing Cooling Methods, (USD Million), 2021 & 2025 & 2032
Table 36. World Two-Phase Liquid Immersion Cooling System Market Size Value by Condensing Cooling Methods (2021-2026) & (USD Million)
Table 37. World Two-Phase Liquid Immersion Cooling System Market Size by Condensing Cooling Methods (2027-2032) & (USD Million)
Table 38. World Two-Phase Liquid Immersion Cooling System Market Size by Application, (USD Million), 2021 & 2025 & 2032
Table 39. World Two-Phase Liquid Immersion Cooling System Market Size by

+357 96 030922
info@marketpublishers.com

Application (2021-2026) & (USD Million)
Table 40. World Two-Phase Liquid Immersion Cooling System Market Size by Application (2027-2032) & (USD Million)
Table 41. LiquidStack Basic Information, Manufacturing Base and Competitors
Table 42. LiquidStack Major Business
Table 43. LiquidStack Two-Phase Liquid Immersion Cooling System Product and Services
Table 44. LiquidStack Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 45. LiquidStack Recent Developments/Updates
Table 46. LiquidStack Competitive Strengths & Weaknesses
Table 47. Green Revolution Cooling(GRC) Basic Information, Manufacturing Base and Competitors
Table 48. Green Revolution Cooling(GRC) Major Business
Table 49. Green Revolution Cooling(GRC) Two-Phase Liquid Immersion Cooling System Product and Services
Table 50. Green Revolution Cooling(GRC) Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 51. Green Revolution Cooling(GRC) Recent Developments/Updates
Table 52. Green Revolution Cooling(GRC) Competitive Strengths & Weaknesses
Table 53. ZutaCore Basic Information, Manufacturing Base and Competitors
Table 54. ZutaCore Major Business
Table 55. ZutaCore Two-Phase Liquid Immersion Cooling System Product and Services
Table 56. ZutaCore Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 57. ZutaCore Recent Developments/Updates
Table 58. ZutaCore Competitive Strengths & Weaknesses
Table 59. Parker Hannifin Basic Information, Manufacturing Base and Competitors
Table 60. Parker Hannifin Major Business
Table 61. Parker Hannifin Two-Phase Liquid Immersion Cooling System Product and Services
Table 62. Parker Hannifin Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 63. Parker Hannifin Recent Developments/Updates
Table 64. Parker Hannifin Competitive Strengths & Weaknesses
Table 65. Boyd Corporation Basic Information, Manufacturing Base and Competitors
Table 66. Boyd Corporation Major Business
Table 67. Boyd Corporation Two-Phase Liquid Immersion Cooling System Product and Services

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Table 68. Boyd Corporation Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 69. Boyd Corporation Recent Developments/Updates
Table 70. Boyd Corporation Competitive Strengths & Weaknesses
Table 71. Vertiv Basic Information, Manufacturing Base and Competitors
Table 72. Vertiv Major Business
Table 73. Vertiv Two-Phase Liquid Immersion Cooling System Product and Services
Table 74. Vertiv Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 75. Vertiv Recent Developments/Updates
Table 76. Vertiv Competitive Strengths & Weaknesses
Table 77. Delta Electronics Basic Information, Manufacturing Base and Competitors
Table 78. Delta Electronics Major Business
Table 79. Delta Electronics Two-Phase Liquid Immersion Cooling System Product and Services
Table 80. Delta Electronics Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 81. Delta Electronics Recent Developments/Updates
Table 82. Delta Electronics Competitive Strengths & Weaknesses
Table 83. NTT Basic Information, Manufacturing Base and Competitors
Table 84. NTT Major Business
Table 85. NTT Two-Phase Liquid Immersion Cooling System Product and Services
Table 86. NTT Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 87. NTT Recent Developments/Updates
Table 88. NTT Competitive Strengths & Weaknesses
Table 89. Gigabyte Basic Information, Manufacturing Base and Competitors
Table 90. Gigabyte Major Business
Table 91. Gigabyte Two-Phase Liquid Immersion Cooling System Product and Services
Table 92. Gigabyte Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 93. Gigabyte Recent Developments/Updates
Table 94. Gigabyte Competitive Strengths & Weaknesses
Table 95. Wiwynn Basic Information, Manufacturing Base and Competitors
Table 96. Wiwynn Major Business
Table 97. Wiwynn Two-Phase Liquid Immersion Cooling System Product and Services
Table 98. Wiwynn Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 99. Wiwynn Recent Developments/Updates

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Table 100. Wiwynn Competitive Strengths & Weaknesses
Table 101. Advanced Cooling Technologies (ACT) Basic Information, Manufacturing Base and Competitors
Table 102. Advanced Cooling Technologies (ACT) Major Business
Table 103. Advanced Cooling Technologies (ACT) Two-Phase Liquid Immersion Cooling System Product and Services
Table 104. Advanced Cooling Technologies (ACT) Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 105. Advanced Cooling Technologies (ACT) Recent Developments/Updates
Table 106. Advanced Cooling Technologies (ACT) Competitive Strengths & Weaknesses
Table 107. Xinhan Intelligent Basic Information, Manufacturing Base and Competitors
Table 108. Xinhan Intelligent Major Business
Table 109. Xinhan Intelligent Two-Phase Liquid Immersion Cooling System Product and Services
Table 110. Xinhan Intelligent Two-Phase Liquid Immersion Cooling System Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 111. Xinhan Intelligent Recent Developments/Updates
Table 112. Xinhan Intelligent Competitive Strengths & Weaknesses
Table 113. Global Key Players of Two-Phase Liquid Immersion Cooling System Upstream (Raw Materials)
Table 114. Global Two-Phase Liquid Immersion Cooling System Typical Customers

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List Of Figures

LIST OF FIGURES

Figure 1. Two-Phase Liquid Immersion Cooling System Picture
Figure 2. World Two-Phase Liquid Immersion Cooling System Total Revenue: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Two-Phase Liquid Immersion Cooling System Total Revenue (2021-2032) & (USD Million)
Figure 4. World Two-Phase Liquid Immersion Cooling System Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Figure 5. World Two-Phase Liquid Immersion Cooling System Revenue Market Share by Region (2021-2032), (by Headquarter Location)
Figure 6. United States Based Company Two-Phase Liquid Immersion Cooling System Revenue (2021-2032) & (USD Million)
Figure 7. China Based Company Two-Phase Liquid Immersion Cooling System Revenue (2021-2032) & (USD Million)
Figure 8. Europe Based Company Two-Phase Liquid Immersion Cooling System Revenue (2021-2032) & (USD Million)
Figure 9. Japan Based Company Two-Phase Liquid Immersion Cooling System Revenue (2021-2032) & (USD Million)
Figure 10. South Korea Based Company Two-Phase Liquid Immersion Cooling System Revenue (2021-2032) & (USD Million)
Figure 11. ASEAN Based Company Two-Phase Liquid Immersion Cooling System Revenue (2021-2032) & (USD Million)
Figure 12. India Based Company Two-Phase Liquid Immersion Cooling System Revenue (2021-2032) & (USD Million)
Figure 13. Two-Phase Liquid Immersion Cooling System Market Drivers
Figure 14. Factors Affecting Demand
Figure 15. World Two-Phase Liquid Immersion Cooling System Consumption Value (2021-2032) & (USD Million)
Figure 16. World Two-Phase Liquid Immersion Cooling System Consumption Value Market Share by Region (2021-2032)
Figure 17. United States Two-Phase Liquid Immersion Cooling System Consumption Value (2021-2032) & (USD Million)
Figure 18. China Two-Phase Liquid Immersion Cooling System Consumption Value (2021-2032) & (USD Million)
Figure 19. Europe Two-Phase Liquid Immersion Cooling System Consumption Value (2021-2032) & (USD Million)

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Figure 20. Japan Two-Phase Liquid Immersion Cooling System Consumption Value (2021-2032) & (USD Million)
Figure 21. South Korea Two-Phase Liquid Immersion Cooling System Consumption Value (2021-2032) & (USD Million)
Figure 22. ASEAN Two-Phase Liquid Immersion Cooling System Consumption Value (2021-2032) & (USD Million)
Figure 23. India Two-Phase Liquid Immersion Cooling System Consumption Value (2021-2032) & (USD Million)
Figure 24. Producer Shipments of Two-Phase Liquid Immersion Cooling System by Player Revenue ($MM) and Market Share (%): 2025
Figure 25. Global Four-firm Concentration Ratios (CR4) for Two-Phase Liquid Immersion Cooling System Markets in 2025
Figure 26. Global Four-firm Concentration Ratios (CR8) for Two-Phase Liquid Immersion Cooling System Markets in 2025
Figure 27. United States VS China: Two-Phase Liquid Immersion Cooling System Revenue Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Two-Phase Liquid Immersion Cooling System Consumption Value Market Share Comparison (2021 & 2025 & 2032)
Figure 29. World Two-Phase Liquid Immersion Cooling System Market Size by Type, (USD Million), 2021 & 2025 & 2032
Figure 30. World Two-Phase Liquid Immersion Cooling System Market Size Market Share by Type in 2025
Figure 31. Open Bath Two-Phase Immersion Cooling System
Figure 32. Closed-Loop Two-Phase Immersion Cooling System
Figure 33. World Two-Phase Liquid Immersion Cooling System Market Size Market Share by Type (2021-2032)
Figure 34. World Two-Phase Liquid Immersion Cooling System Market Size by Circulation Method, (USD Million), 2021 & 2025 & 2032
Figure 35. World Two-Phase Liquid Immersion Cooling System Market Size Market Share by Circulation Method in 2025
Figure 36. Natural Circulation
Figure 37. Forced Circulation
Figure 38. World Two-Phase Liquid Immersion Cooling System Market Size Market Share by Circulation Method (2021-2032)
Figure 39. World Two-Phase Liquid Immersion Cooling System Market Size by Condensing Cooling Methods, (USD Million), 2021 & 2025 & 2032
Figure 40. World Two-Phase Liquid Immersion Cooling System Market Size Market Share by Condensing Cooling Methods in 2025
Figure 41. Built-In Coil Condensing Type

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Figure 42. External Loop Condensing Type
Figure 43. World Two-Phase Liquid Immersion Cooling System Market Size Market Share by Condensing Cooling Methods (2021-2032)
Figure 44. World Two-Phase Liquid Immersion Cooling System Market Size by Application, (USD Million), 2021 & 2025 & 2032
Figure 45. World Two-Phase Liquid Immersion Cooling System Market Size Market Share by Application in 2025
Figure 46. Cloud Data Centers
Figure 47. High-Performance Computing
Figure 48. Edge Computing
Figure 49. Others
Figure 50. World Two-Phase Liquid Immersion Cooling System Market Size Market Share by Application (2021-2032)
Figure 51. Two-Phase Liquid Immersion Cooling System Industrial Chain
Figure 52. Methodology
Figure 53. Research Process and Data Source

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