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Global Two-Phase Liquid Immersion Cooling System Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Two-Phase Liquid Immersion Cooling System market size was valued at US$ 424 million in 2025 and is forecast to a readjusted size of US$ 1024 million by 2032 with a CAGR of 13.5% during review period.

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

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

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

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

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center expansion. European markets show increasing interest driven by energy 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 is a detailed and comprehensive analysis for global Two-Phase Liquid Immersion Cooling System market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Two-Phase Liquid Immersion Cooling System market size and forecasts, in consumption value ($ Million), 2021-2032

Global Two-Phase Liquid Immersion Cooling System market size and forecasts by region and country, in consumption value ($ Million), 2021-2032

Global Two-Phase Liquid Immersion Cooling System market size and forecasts, by Type and by Application, in consumption value ($ Million), 2021-2032

Global Two-Phase Liquid Immersion Cooling System market shares of main players, in revenue ($ Million), 2021-2026

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The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Two-Phase Liquid Immersion Cooling System

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global 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.

Two-Phase Liquid Immersion Cooling System market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segmentation

Market segment by Type

Open Bath Two-Phase Immersion Cooling System

Closed-Loop Two-Phase Immersion Cooling System

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Market segment by Circulation Method

Natural Circulation

Forced Circulation

Market segment by Condensing Cooling Methods

Built-In Coil Condensing Type

External Loop Condensing Type

Market segment by Application

Cloud Data Centers

High-Performance Computing

Edge Computing

Others

Market segment by players, this report covers

LiquidStack

Green Revolution Cooling(GRC)

ZutaCore

Parker Hannifin

Boyd Corporation

Vertiv

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Delta Electronics

NTT

Gigabyte

Wiwynn

Advanced Cooling Technologies (ACT)

Xinhan Intelligent

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Two-Phase Liquid Immersion Cooling System product scope, market overview, market estimation caveats and base year.
Chapter 2, to profile the top players of Two-Phase Liquid Immersion Cooling System, with revenue, gross margin, and global market share of Two-Phase Liquid Immersion Cooling System from 2021 to 2026.
Chapter 3, the Two-Phase Liquid Immersion Cooling System competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

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Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.
Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026.and Two-Phase Liquid Immersion Cooling System market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.
Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.
Chapter 12, the key raw materials and key suppliers, and industry chain of Two-Phase Liquid Immersion Cooling System.
Chapter 13, to describe Two-Phase Liquid Immersion Cooling System research findings and conclusion.

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