

Global Immersion Cooling System for Data Center Market Growth 2026-2032

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Abstracts

The global Immersion Cooling System for Data Center market size is predicted to grow from US\$ 285 million in 2025 to US\$ 629 million in 2032; it is expected to grow at a CAGR of 12.0% from 2026 to 2032.

Immersion Cooling System for Data Center refers to an advanced thermal management solution in which servers and their electronic components are fully submerged in a dielectric cooling liquid. The system typically consists of a sealed immersion tank, dielectric coolant, circulation pumps, heat exchangers, a Coolant Distribution Unit (CDU), and intelligent monitoring modules. Structurally, it resembles an industrial-grade metallic cabinet or modular enclosure. Based on whether the coolant undergoes phase change, the technology is categorized into single-phase and two-phase immersion cooling systems. The operating principle relies on the high thermal conductivity and specific heat capacity of liquid media to directly remove heat from electronic components, eliminating traditional air-cooling pathways. This approach significantly improves energy efficiency and supports ultra-high power density workloads. It is widely deployed in AI training clusters, high-performance computing (HPC), edge data centers, and high-density GPU infrastructure, representing a next-generation cooling architecture for modern high-compute data centers.

In terms of market development opportunities and main driving factors, Immersion Cooling System for Data Center is transitioning from a technology validation phase to a large-scale deployment stage. The rapid expansion of large AI model training, generative AI inference, high-performance computing (HPC), and high-density GPU clusters has driven rack power density from 10-20 kW to 40 kW, 80 kW, or even above 100 kW. Traditional air cooling and some direct-to-chip liquid cooling solutions are approaching their physical and efficiency limits, positioning immersion cooling as a key

alternative due to its superior heat flux handling capability and lower PUE potential. Meanwhile, global carbon neutrality targets and tightening energy regulations have placed data centers under stricter efficiency requirements. Immersion cooling reduces fan power consumption, simplifies cooling chains, and enables high-temperature heat recovery, providing structural support for green data center development. In addition, new computing hubs and modular edge deployments increasingly favor prefabricated and containerized solutions, where immersion systems demonstrate strong adaptability. Upstream localization of dielectric fluids and immersion-ready server designs are also lowering integration barriers. From a capital perspective, computing infrastructure is viewed as strategic new infrastructure, and the combined effects of policy incentives, industrial funds, and energy transition are accelerating broader commercialization.

Regarding market challenges, risks, and restraints, large-scale adoption still faces several constraints. Initial capital expenditure remains relatively high, including immersion tanks, coolant filling, customized server modifications, and heat exchange systems. The short-term ROI may be uncertain, especially in regions with low electricity prices or underutilized computing capacity. Industry standards are still evolving, with incomplete harmonization in hardware compatibility, coolant stability, sealing requirements, and fire safety regulations, potentially leading to ecosystem fragmentation. Operational maturity is another challenge, as traditional data center operators lack experience maintaining servers in liquid environments, and customers may have concerns about reliability, warranties, and asset residual value. Coolant price volatility, supply chain concentration, and environmental compliance issues, particularly regarding certain fluorinated fluids, also represent potential risks. Structurally, hyperscale cloud providers may prefer in-house development or partnerships with leading vendors, creating entry barriers for smaller players and prolonging commercialization cycles.

In terms of downstream demand trends, future demand will be characterized by high-density prioritization, coexistence of centralized and edge computing, and integration of green energy with computing-as-a-service models. AI training clusters and supercomputing centers will remain the primary growth drivers, as thermal management increasingly becomes a limiting factor for next-generation GPUs and AI accelerators. At the same time, compact modular immersion systems may find opportunities in edge scenarios with limited space or challenging environmental conditions. Energy transition will drive data centers toward renewable-rich regions, where immersion cooling's high-temperature heat reuse capability supports integrated computing + energy utilization models. As computing services become more platformized, third-party operators will

focus on lifecycle energy efficiency and power density optimization, further strengthening the value proposition of immersion cooling. Overall, procurement patterns are expected to shift from pilot-based adoption toward scaled infrastructure deployment, accelerating ecosystem formation in the coming years.

LP Information, Inc. (LPI) ' newest research report, the "Immersion Cooling System for Data Center Industry Forecast" looks at past sales and reviews total world Immersion Cooling System for Data Center sales in 2025, providing a comprehensive analysis by region and market sector of projected Immersion Cooling System for Data Center sales for 2026 through 2032. With Immersion Cooling System for Data Center sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Immersion Cooling System for Data Center industry.

This Insight Report provides a comprehensive analysis of the global Immersion Cooling System for Data Center landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Immersion Cooling System for Data Center portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Immersion Cooling System for Data Center market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Immersion Cooling System for Data Center and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Immersion Cooling System for Data Center.

This report presents a comprehensive overview, market shares, and growth opportunities of Immersion Cooling System for Data Center market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Single Phase Cooling

Two Phase Cooling

Segmentation by Coolant Chemical Composition:

Synthetic Hydrocarbon-Based Immersion Cooling System

Mineral Oil-Based Immersion Cooling System

Fluorocarbon-Based Immersion Cooling System

Engineered Dielectric Fluid-Based System

Bio-Based Dielectric Fluid System

Segmentation by Physical Structural Configuration:

Open-Bath Immersion Tank System

Sealed Tank Immersion System

Modular Containerized Immersion System

Rack-Integrated Immersion System

Segmentation by Coolant Circulation Mechanism:

Passive Natural Convection System

Pump-Driven Circulation System

Gravity-Assisted Circulation System

Hybrid Circulation Immersion System

Segmentation by Application:

Small and Medium Data Centers

Large Data Centers

Hyper-Scale Data Centers

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Schneider Electric

Vertiv Holdings

Fujitsu

Delta Electronics

GIGABYTE Technology

Wiwynn Corporation

Shenzhen Envicool Technology

GRC

Submer

Trane Technologies

Asperitas

Iceotope

LiquidCool Solutions

Midas Immersion Cooling

DCX Liquid Cooling Systems

Nautilus Data Technologies

Mitsubishi Heavy Industries

Key Questions Addressed in this Report

What is the 10-year outlook for the global Immersion Cooling System for Data Center market?

What factors are driving Immersion Cooling System for Data Center market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Immersion Cooling System for Data Center market opportunities vary by end market size?

How does Immersion Cooling System for Data Center break out by Type, by Application?

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