

Global Phase Change Immersion Cooling System Market Growth 2026-2032

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Abstracts

The global Phase Change Immersion Cooling System market size is predicted to grow from US\$ 308 million in 2025 to US\$ 1044 million in 2032; it is expected to grow at a CAGR of 18.9% from 2026 to 2032.

Phase Change Immersion Cooling Systems submerge servers, GPU computing nodes, ASIC miners, and other high-power electronic equipment directly in a low-boiling-point dielectric fluid, using fluid evaporation, vapor condensation, and liquid return to achieve efficient heat removal. A complete system generally includes a sealed immersion tank, condenser, secondary cooling loop, fluid recovery unit, monitoring and control system, and external heat-rejection equipment. Major applications include artificial intelligence, high-performance computing, hyperscale data centers, digital asset computing, and edge computing. Key upstream inputs include dielectric fluids, tanks, heat exchangers, pumps, valves, sensors, seals, and controllers, while major downstream customers include cloud service providers, data center operators, AI computing centers, HPC facilities, and research institutions. In 2025, global effective annual production capacity was approximately 2,150 units, sales reached about 1,624 units, the average ex-factory price was around USD 194,000 per unit, and the industry gross margin was approximately 25%–40%.

The global Phase Change Immersion Cooling System market remains at an early stage of commercialization and is smaller than the single-phase immersion and direct-to-chip liquid cooling markets. However, it offers strong heat-removal capability in ultra-high heat-flux environments. By using fluid boiling, vapor condensation, and liquid return, the system can reduce dependence on server fans and conventional air-side cooling equipment while increasing computing density per unit of floor space. Current demand is concentrated in AI training, high-performance computing, digital asset computing, and

selected hyperscale data centers, while conventional enterprise data centers remain focused mainly on pilot and small-scale deployments.

Product development is moving toward sealed, modular, and higher-capacity integrated systems. New-generation solutions place greater emphasis on tank sealing, pressure control, fluid recovery, online maintenance, and parallel operation of multiple tanks. The market is also shifting from standalone immersion tanks toward modular platforms integrating power distribution, condensation, heat rejection, and intelligent monitoring. As the power consumption of GPUs, AI accelerators, and high-performance processors continues to increase, cooling capacity per system is rising. Future competition will focus less on nominal cooling capacity alone and more on temperature uniformity, fluid loss, equipment compatibility, operating reliability, and lifecycle cost.

Market growth is primarily driven by investment in AI infrastructure, high-performance computing centers, and high-density data centers. Compared with conventional air cooling, phase change immersion cooling can reduce cooling-space requirements, lower fan energy consumption, and provide a more stable operating temperature for high-power processors. Systems combined with dry coolers and modular deployment may also offer advantages in hot, water-constrained, or space-limited regions. As server manufacturers introduce immersion-ready platforms and cooling suppliers strengthen joint validation with IT hardware companies, the technology is expected to expand gradually from digital asset computing into AI, cloud computing, and scientific research applications.

The industry still faces challenges related to high fluid costs, stricter environmental requirements, sealing complexity, and immature maintenance practices. Low-boiling dielectric fluids are expensive, and leakage or evaporation losses can materially increase total cost of ownership. Certain fluorinated fluids also face environmental scrutiny and long-term supply uncertainty. In addition, server maintenance, component compatibility, tank pressure management, equipment warranties, and technical standards require further improvement. Future large-scale adoption will depend mainly on the commercialization of lower-impact fluids, native server compatibility, greater system standardization, and stronger lifecycle economics compared with alternative liquid cooling technologies.

LP Information, Inc. (LPI) ' newest research report, the "Phase Change Immersion Cooling System Industry Forecast" looks at past sales and reviews total world Phase Change Immersion Cooling System sales in 2025, providing a comprehensive analysis by region and market sector of projected Phase Change Immersion Cooling System

sales for 2026 through 2032. With Phase Change Immersion Cooling System sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Phase Change Immersion Cooling System industry.

This Insight Report provides a comprehensive analysis of the global Phase Change Immersion Cooling System 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 Phase Change Immersion Cooling System portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Phase Change Immersion Cooling System market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Phase Change Immersion Cooling System 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 Phase Change Immersion Cooling System.

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

Segmentation by Type:

Open-bath Systems

Semi-hermetic Systems

Hermetically Sealed Systems

Segmentation by Tank Orientation:

Horizontal Tank Systems

Vertical Tank Systems

Segmentation by Cooling Capacity:

Below 100 kW

100–299 kW

300–599 kW

600 kW and Above

Segmentation by Application:

Data Center Operators

Cloud and AI Computing Providers

Other

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.

Trane Technologies

MARA Holdings

Wiwynn

AEWIN Technologies

Kenmec Mechanical Engineering

Fourier Cooling Solutions

E3 NV

Key Questions Addressed in this Report

What is the 10-year outlook for the global Phase Change Immersion Cooling System market?

What factors are driving Phase Change Immersion Cooling System market growth, globally and by region?

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

How do Phase Change Immersion Cooling System market opportunities vary by end market size?

How does Phase Change Immersion Cooling System break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Phase Change Immersion Cooling System Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Phase Change Immersion Cooling System by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Phase Change Immersion Cooling System by Country/Region, 2021, 2025 & 2032
- 2.2 Phase Change Immersion Cooling System Segment by Type
 - 2.2.1 Open-bath Systems
 - 2.2.2 Semi-hermetic Systems
 - 2.2.3 Hermetically Sealed Systems
 - 2.2.4 Phase Change Immersion Cooling System Sales by Type
 - 2.2.4.1 Global Phase Change Immersion Cooling System Sales Market Share by Type (2021-2026)
 - 2.2.4.2 Global Phase Change Immersion Cooling System Revenue and Market Share by Type (2021-2026)
 - 2.2.4.3 Global Phase Change Immersion Cooling System Sale Price by Type (2021-2026)
- 2.3 Phase Change Immersion Cooling System Segment by Tank Orientation
 - 2.3.1 Horizontal Tank Systems
 - 2.3.2 Vertical Tank Systems
 - 2.3.3 Phase Change Immersion Cooling System Sales by Tank Orientation
 - 2.3.3.1 Global Phase Change Immersion Cooling System Sales Market Share by Tank Orientation (2021-2026)
 - 2.3.3.2 Global Phase Change Immersion Cooling System Revenue and Market Share

by Tank Orientation (2021-2026)

2.3.3.3 Global Phase Change Immersion Cooling System Sale Price by Tank Orientation (2021-2026)

2.4 Phase Change Immersion Cooling System Segment by Cooling Capacity

2.4.1 Below 100 kW

2.4.2 100–299 kW

2.4.3 300–599 kW

2.4.4 600 kW and Above

2.4.5 Phase Change Immersion Cooling System Sales by Cooling Capacity

2.4.5.1 Global Phase Change Immersion Cooling System Sales Market Share by Cooling Capacity (2021-2026)

2.4.5.2 Global Phase Change Immersion Cooling System Revenue and Market Share by Cooling Capacity (2021-2026)

2.4.5.3 Global Phase Change Immersion Cooling System Sale Price by Cooling Capacity (2021-2026)

2.5 Phase Change Immersion Cooling System Segment by Application

2.5.1 Data Center Operators

2.5.2 Cloud and AI Computing Providers

2.5.3 Other

2.5.4 Phase Change Immersion Cooling System Sales by Application

2.5.4.1 Global Phase Change Immersion Cooling System Sale Market Share by Application (2021-2026)

2.5.4.2 Global Phase Change Immersion Cooling System Revenue and Market Share by Application (2021-2026)

2.5.4.3 Global Phase Change Immersion Cooling System Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Phase Change Immersion Cooling System Breakdown Data by Company

3.1.1 Global Phase Change Immersion Cooling System Annual Sales by Company (2021-2026)

3.1.2 Global Phase Change Immersion Cooling System Sales Market Share by Company (2021-2026)

3.2 Global Phase Change Immersion Cooling System Annual Revenue by Company (2021-2026)

3.2.1 Global Phase Change Immersion Cooling System Revenue by Company (2021-2026)

3.2.2 Global Phase Change Immersion Cooling System Revenue Market Share by

Company (2021-2026)

3.3 Global Phase Change Immersion Cooling System Sale Price by Company

3.4 Key Manufacturers Phase Change Immersion Cooling System Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Phase Change Immersion Cooling System Product Location Distribution

3.4.2 Players Phase Change Immersion Cooling System Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR PHASE CHANGE IMMERSION COOLING SYSTEM BY GEOGRAPHIC REGION

4.1 World Historic Phase Change Immersion Cooling System Market Size by Geographic Region (2021-2026)

4.1.1 Global Phase Change Immersion Cooling System Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Phase Change Immersion Cooling System Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Phase Change Immersion Cooling System Market Size by Country/Region (2021-2026)

4.2.1 Global Phase Change Immersion Cooling System Annual Sales by Country/Region (2021-2026)

4.2.2 Global Phase Change Immersion Cooling System Annual Revenue by Country/Region (2021-2026)

4.3 Americas Phase Change Immersion Cooling System Sales Growth

4.4 APAC Phase Change Immersion Cooling System Sales Growth

4.5 Europe Phase Change Immersion Cooling System Sales Growth

4.6 Middle East & Africa Phase Change Immersion Cooling System Sales Growth

5 AMERICAS

5.1 Americas Phase Change Immersion Cooling System Sales by Country

5.1.1 Americas Phase Change Immersion Cooling System Sales by Country (2021-2026)

5.1.2 Americas Phase Change Immersion Cooling System Revenue by Country

(2021-2026)

5.2 Americas Phase Change Immersion Cooling System Sales by Type (2021-2026)

5.3 Americas Phase Change Immersion Cooling System Sales by Application

(2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Phase Change Immersion Cooling System Sales by Region

6.1.1 APAC Phase Change Immersion Cooling System Sales by Region (2021-2026)

6.1.2 APAC Phase Change Immersion Cooling System Revenue by Region

(2021-2026)

6.2 APAC Phase Change Immersion Cooling System Sales by Type (2021-2026)

6.3 APAC Phase Change Immersion Cooling System Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Phase Change Immersion Cooling System by Country

7.1.1 Europe Phase Change Immersion Cooling System Sales by Country

(2021-2026)

7.1.2 Europe Phase Change Immersion Cooling System Revenue by Country

(2021-2026)

7.2 Europe Phase Change Immersion Cooling System Sales by Type (2021-2026)

7.3 Europe Phase Change Immersion Cooling System Sales by Application

(2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Phase Change Immersion Cooling System by Country

8.1.1 Middle East & Africa Phase Change Immersion Cooling System Sales by Country (2021-2026)

8.1.2 Middle East & Africa Phase Change Immersion Cooling System Revenue by Country (2021-2026)

8.2 Middle East & Africa Phase Change Immersion Cooling System Sales by Type (2021-2026)

8.3 Middle East & Africa Phase Change Immersion Cooling System Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Phase Change Immersion Cooling System

10.3 Manufacturing Process Analysis of Phase Change Immersion Cooling System

10.4 Industry Chain Structure of Phase Change Immersion Cooling System

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Phase Change Immersion Cooling System Distributors

11.3 Phase Change Immersion Cooling System Customer

12 WORLD FORECAST REVIEW FOR PHASE CHANGE IMMERSION COOLING SYSTEM BY GEOGRAPHIC REGION

12.1 Global Phase Change Immersion Cooling System Market Size Forecast by Region

12.1.1 Global Phase Change Immersion Cooling System Forecast by Region (2027-2032)

12.1.2 Global Phase Change Immersion Cooling System Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Phase Change Immersion Cooling System Forecast by Type (2027-2032)

12.7 Global Phase Change Immersion Cooling System Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Trane Technologies

13.1.1 Trane Technologies Company Information

13.1.2 Trane Technologies Phase Change Immersion Cooling System Product Portfolios and Specifications

13.1.3 Trane Technologies Phase Change Immersion Cooling System Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Trane Technologies Main Business Overview

13.1.5 Trane Technologies Latest Developments

13.2 MARA Holdings

13.2.1 MARA Holdings Company Information

13.2.2 MARA Holdings Phase Change Immersion Cooling System Product Portfolios and Specifications

13.2.3 MARA Holdings Phase Change Immersion Cooling System Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 MARA Holdings Main Business Overview

13.2.5 MARA Holdings Latest Developments

13.3 Wiwynn

13.3.1 Wiwynn Company Information

13.3.2 Wiwynn Phase Change Immersion Cooling System Product Portfolios and

Specifications

13.3.3 Wiwynn Phase Change Immersion Cooling System Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Wiwynn Main Business Overview

13.3.5 Wiwynn Latest Developments

13.4 AEWIN Technologies

13.4.1 AEWIN Technologies Company Information

13.4.2 AEWIN Technologies Phase Change Immersion Cooling System Product Portfolios and Specifications

13.4.3 AEWIN Technologies Phase Change Immersion Cooling System Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 AEWIN Technologies Main Business Overview

13.4.5 AEWIN Technologies Latest Developments

13.5 Kenmec Mechanical Engineering

13.5.1 Kenmec Mechanical Engineering Company Information

13.5.2 Kenmec Mechanical Engineering Phase Change Immersion Cooling System Product Portfolios and Specifications

13.5.3 Kenmec Mechanical Engineering Phase Change Immersion Cooling System Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Kenmec Mechanical Engineering Main Business Overview

13.5.5 Kenmec Mechanical Engineering Latest Developments

13.6 Fourier Cooling Solutions

13.6.1 Fourier Cooling Solutions Company Information

13.6.2 Fourier Cooling Solutions Phase Change Immersion Cooling System Product Portfolios and Specifications

13.6.3 Fourier Cooling Solutions Phase Change Immersion Cooling System Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Fourier Cooling Solutions Main Business Overview

13.6.5 Fourier Cooling Solutions Latest Developments

13.7 E3 NV

13.7.1 E3 NV Company Information

13.7.2 E3 NV Phase Change Immersion Cooling System Product Portfolios and Specifications

13.7.3 E3 NV Phase Change Immersion Cooling System Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 E3 NV Main Business Overview

13.7.5 E3 NV Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Phase Change Immersion Cooling System Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Phase Change Immersion Cooling System Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Open-bath Systems

Table 4. Major Players of Semi-hermetic Systems

Table 5. Major Players of Hermetically Sealed Systems

Table 6. Global Phase Change Immersion Cooling System Sales by Type (2021-2026) & (Units)

Table 7. Global Phase Change Immersion Cooling System Sales Market Share by Type (2021-2026)

Table 8. Global Phase Change Immersion Cooling System Revenue by Type (2021-2026) & (\$ million)

Table 9. Global Phase Change Immersion Cooling System Revenue Market Share by Type (2021-2026)

Table 10. Global Phase Change Immersion Cooling System Sale Price by Type (2021-2026) & (K US\$/Unit)

Table 11. Major Players of Horizontal Tank Systems

Table 12. Major Players of Vertical Tank Systems

Table 13. Global Phase Change Immersion Cooling System Sales by Tank Orientation (2021-2026) & (Units)

Table 14. Global Phase Change Immersion Cooling System Sales Market Share by Tank Orientation (2021-2026)

Table 15. Global Phase Change Immersion Cooling System Revenue by Tank Orientation (2021-2026) & (\$ million)

Table 16. Global Phase Change Immersion Cooling System Revenue Market Share by Tank Orientation (2021-2026)

Table 17. Global Phase Change Immersion Cooling System Sale Price by Tank Orientation (2021-2026) & (K US\$/Unit)

Table 18. Major Players of Below 100 kW

Table 19. Major Players of 100–299 kW

Table 20. Major Players of 300–599 kW

Table 21. Major Players of 600 kW and Above

Table 22. Global Phase Change Immersion Cooling System Sales by Cooling Capacity (2021-2026) & (Units)

Table 23. Global Phase Change Immersion Cooling System Sales Market Share by Cooling Capacity (2021-2026)

Table 24. Global Phase Change Immersion Cooling System Revenue by Cooling Capacity (2021-2026) & (\$ million)

Table 25. Global Phase Change Immersion Cooling System Revenue Market Share by Cooling Capacity (2021-2026)

Table 26. Global Phase Change Immersion Cooling System Sale Price by Cooling Capacity (2021-2026) & (K US\$/Unit)

Table 27. Global Phase Change Immersion Cooling System Sale by Application (2021-2026) & (Units)

Table 28. Global Phase Change Immersion Cooling System Sale Market Share by Application (2021-2026)

Table 29. Global Phase Change Immersion Cooling System Revenue by Application (2021-2026) & (\$ million)

Table 30. Global Phase Change Immersion Cooling System Revenue Market Share by Application (2021-2026)

Table 31. Global Phase Change Immersion Cooling System Sale Price by Application (2021-2026) & (K US\$/Unit)

Table 32. Global Phase Change Immersion Cooling System Sales by Company (2021-2026) & (Units)

Table 33. Global Phase Change Immersion Cooling System Sales Market Share by Company (2021-2026)

Table 34. Global Phase Change Immersion Cooling System Revenue by Company (2021-2026) & (\$ millions)

Table 35. Global Phase Change Immersion Cooling System Revenue Market Share by Company (2021-2026)

Table 36. Global Phase Change Immersion Cooling System Sale Price by Company (2021-2026) & (K US\$/Unit)

Table 37. Key Manufacturers Phase Change Immersion Cooling System Producing Area Distribution and Sales Area

Table 38. Players Phase Change Immersion Cooling System Products Offered

Table 39. Phase Change Immersion Cooling System Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 40. New Products and Potential Entrants

Table 41. Market M&A Activity & Strategy

Table 42. Global Phase Change Immersion Cooling System Sales by Geographic Region (2021-2026) & (Units)

Table 43. Global Phase Change Immersion Cooling System Sales Market Share Geographic Region (2021-2026)

Table 44. Global Phase Change Immersion Cooling System Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 45. Global Phase Change Immersion Cooling System Revenue Market Share by Geographic Region (2021-2026)

Table 46. Global Phase Change Immersion Cooling System Sales by Country/Region (2021-2026) & (Units)

Table 47. Global Phase Change Immersion Cooling System Sales Market Share by Country/Region (2021-2026)

Table 48. Global Phase Change Immersion Cooling System Revenue by Country/Region (2021-2026) & (\$ millions)

Table 49. Global Phase Change Immersion Cooling System Revenue Market Share by Country/Region (2021-2026)

Table 50. Americas Phase Change Immersion Cooling System Sales by Country (2021-2026) & (Units)

Table 51. Americas Phase Change Immersion Cooling System Sales Market Share by Country (2021-2026)

Table 52. Americas Phase Change Immersion Cooling System Revenue by Country (2021-2026) & (\$ millions)

Table 53. Americas Phase Change Immersion Cooling System Sales by Type (2021-2026) & (Units)

Table 54. Americas Phase Change Immersion Cooling System Sales by Application (2021-2026) & (Units)

Table 55. APAC Phase Change Immersion Cooling System Sales by Region (2021-2026) & (Units)

Table 56. APAC Phase Change Immersion Cooling System Sales Market Share by Region (2021-2026)

Table 57. APAC Phase Change Immersion Cooling System Revenue by Region (2021-2026) & (\$ millions)

Table 58. APAC Phase Change Immersion Cooling System Sales by Type (2021-2026) & (Units)

Table 59. APAC Phase Change Immersion Cooling System Sales by Application (2021-2026) & (Units)

Table 60. Europe Phase Change Immersion Cooling System Sales by Country (2021-2026) & (Units)

Table 61. Europe Phase Change Immersion Cooling System Revenue by Country (2021-2026) & (\$ millions)

Table 62. Europe Phase Change Immersion Cooling System Sales by Type (2021-2026) & (Units)

Table 63. Europe Phase Change Immersion Cooling System Sales by Application

(2021-2026) & (Units)

Table 64. Middle East & Africa Phase Change Immersion Cooling System Sales by Country (2021-2026) & (Units)

Table 65. Middle East & Africa Phase Change Immersion Cooling System Revenue Market Share by Country (2021-2026)

Table 66. Middle East & Africa Phase Change Immersion Cooling System Sales by Type (2021-2026) & (Units)

Table 67. Middle East & Africa Phase Change Immersion Cooling System Sales by Application (2021-2026) & (Units)

Table 68. Key Market Drivers & Growth Opportunities of Phase Change Immersion Cooling System

Table 69. Key Market Challenges & Risks of Phase Change Immersion Cooling System

Table 70. Key Industry Trends of Phase Change Immersion Cooling System

Table 71. Phase Change Immersion Cooling System Raw Material

Table 72. Key Suppliers of Raw Materials

Table 73. Phase Change Immersion Cooling System Distributors List

Table 74. Phase Change Immersion Cooling System Customer List

Table 75. Global Phase Change Immersion Cooling System Sales Forecast by Region (2027-2032) & (Units)

Table 76. Global Phase Change Immersion Cooling System Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 77. Americas Phase Change Immersion Cooling System Sales Forecast by Country (2027-2032) & (Units)

Table 78. Americas Phase Change Immersion Cooling System Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 79. APAC Phase Change Immersion Cooling System Sales Forecast by Region (2027-2032) & (Units)

Table 80. APAC Phase Change Immersion Cooling System Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 81. Europe Phase Change Immersion Cooling System Sales Forecast by Country (2027-2032) & (Units)

Table 82. Europe Phase Change Immersion Cooling System Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 83. Middle East & Africa Phase Change Immersion Cooling System Sales Forecast by Country (2027-2032) & (Units)

Table 84. Middle East & Africa Phase Change Immersion Cooling System Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 85. Global Phase Change Immersion Cooling System Sales Forecast by Type (2027-2032) & (Units)

Table 86. Global Phase Change Immersion Cooling System Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 87. Global Phase Change Immersion Cooling System Sales Forecast by Application (2027-2032) & (Units)

Table 88. Global Phase Change Immersion Cooling System Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 89. Trane Technologies Basic Information, Phase Change Immersion Cooling System Manufacturing Base, Sales Area and Its Competitors

Table 90. Trane Technologies Phase Change Immersion Cooling System Product Portfolios and Specifications

Table 91. Trane Technologies Phase Change Immersion Cooling System Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 92. Trane Technologies Main Business

Table 93. Trane Technologies Latest Developments

Table 94. MARA Holdings Basic Information, Phase Change Immersion Cooling System Manufacturing Base, Sales Area and Its Competitors

Table 95. MARA Holdings Phase Change Immersion Cooling System Product Portfolios and Specifications

Table 96. MARA Holdings Phase Change Immersion Cooling System Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 97. MARA Holdings Main Business

Table 98. MARA Holdings Latest Developments

Table 99. Wiwynn Basic Information, Phase Change Immersion Cooling System Manufacturing Base, Sales Area and Its Competitors

Table 100. Wiwynn Phase Change Immersion Cooling System Product Portfolios and Specifications

Table 101. Wiwynn Phase Change Immersion Cooling System Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 102. Wiwynn Main Business

Table 103. Wiwynn Latest Developments

Table 104. AEWIN Technologies Basic Information, Phase Change Immersion Cooling System Manufacturing Base, Sales Area and Its Competitors

Table 105. AEWIN Technologies Phase Change Immersion Cooling System Product Portfolios and Specifications

Table 106. AEWIN Technologies Phase Change Immersion Cooling System Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 107. AEWIN Technologies Main Business

Table 108. AEWIN Technologies Latest Developments

Table 109. Kenmec Mechanical Engineering Basic Information, Phase Change

Immersion Cooling System Manufacturing Base, Sales Area and Its Competitors

Table 110. Kenmec Mechanical Engineering Phase Change Immersion Cooling System Product Portfolios and Specifications

Table 111. Kenmec Mechanical Engineering Phase Change Immersion Cooling System Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 112. Kenmec Mechanical Engineering Main Business

Table 113. Kenmec Mechanical Engineering Latest Developments

Table 114. Fourier Cooling Solutions Basic Information, Phase Change Immersion Cooling System Manufacturing Base, Sales Area and Its Competitors

Table 115. Fourier Cooling Solutions Phase Change Immersion Cooling System Product Portfolios and Specifications

Table 116. Fourier Cooling Solutions Phase Change Immersion Cooling System Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 117. Fourier Cooling Solutions Main Business

Table 118. Fourier Cooling Solutions Latest Developments

Table 119. E3 NV Basic Information, Phase Change Immersion Cooling System Manufacturing Base, Sales Area and Its Competitors

Table 120. E3 NV Phase Change Immersion Cooling System Product Portfolios and Specifications

Table 121. E3 NV Phase Change Immersion Cooling System Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 122. E3 NV Main Business

Table 123. E3 NV Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Phase Change Immersion Cooling System
- Figure 2. Phase Change Immersion Cooling System Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Phase Change Immersion Cooling System Sales Growth Rate 2021-2032 (Units)
- Figure 7. Global Phase Change Immersion Cooling System Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Phase Change Immersion Cooling System Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Phase Change Immersion Cooling System Sales Market Share by Country/Region (2025)
- Figure 10. Phase Change Immersion Cooling System Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Open-bath Systems
- Figure 12. Product Picture of Semi-hermetic Systems
- Figure 13. Product Picture of Hermetically Sealed Systems
- Figure 14. Global Phase Change Immersion Cooling System Sales Market Share by Type in 2026
- Figure 15. Global Phase Change Immersion Cooling System Revenue Market Share by Type (2021-2026)
- Figure 16. Product Picture of Horizontal Tank Systems
- Figure 17. Product Picture of Vertical Tank Systems
- Figure 18. Global Phase Change Immersion Cooling System Sales Market Share by Tank Orientation in 2026
- Figure 19. Global Phase Change Immersion Cooling System Revenue Market Share by Tank Orientation (2021-2026)
- Figure 20. Product Picture of Below 100 kW
- Figure 21. Product Picture of 100–299 kW
- Figure 22. Product Picture of 300–599 kW
- Figure 23. Product Picture of 600 kW and Above
- Figure 24. Global Phase Change Immersion Cooling System Sales Market Share by Cooling Capacity in 2026
- Figure 25. Global Phase Change Immersion Cooling System Revenue Market Share by

Cooling Capacity (2021-2026)

Figure 26. Phase Change Immersion Cooling System Consumed in Data Center Operators

Figure 27. Global Phase Change Immersion Cooling System Market: Data Center Operators (2021-2026) & (Units)

Figure 28. Phase Change Immersion Cooling System Consumed in Cloud and AI Computing Providers

Figure 29. Global Phase Change Immersion Cooling System Market: Cloud and AI Computing Providers (2021-2026) & (Units)

Figure 30. Phase Change Immersion Cooling System Consumed in Other

Figure 31. Global Phase Change Immersion Cooling System Market: Other (2021-2026) & (Units)

Figure 32. Global Phase Change Immersion Cooling System Sale Market Share by Application (2025)

Figure 33. Global Phase Change Immersion Cooling System Revenue Market Share by Application in 2025

Figure 34. Phase Change Immersion Cooling System Sales by Company in 2025 (Units)

Figure 35. Global Phase Change Immersion Cooling System Sales Market Share by Company in 2025

Figure 36. Phase Change Immersion Cooling System Revenue by Company in 2025 (\$ millions)

Figure 37. Global Phase Change Immersion Cooling System Revenue Market Share by Company in 2025

Figure 38. Global Phase Change Immersion Cooling System Sales Market Share by Geographic Region (2021-2026)

Figure 39. Global Phase Change Immersion Cooling System Revenue Market Share by Geographic Region in 2025

Figure 40. Americas Phase Change Immersion Cooling System Sales 2021-2026 (Units)

Figure 41. Americas Phase Change Immersion Cooling System Revenue 2021-2026 (\$ millions)

Figure 42. APAC Phase Change Immersion Cooling System Sales 2021-2026 (Units)

Figure 43. APAC Phase Change Immersion Cooling System Revenue 2021-2026 (\$ millions)

Figure 44. Europe Phase Change Immersion Cooling System Sales 2021-2026 (Units)

Figure 45. Europe Phase Change Immersion Cooling System Revenue 2021-2026 (\$ millions)

Figure 46. Middle East & Africa Phase Change Immersion Cooling System Sales

2021-2026 (Units)

Figure 47. Middle East & Africa Phase Change Immersion Cooling System Revenue
2021-2026 (\$ millions)

Figure 48. Americas Phase Change Immersion Cooling System Sales Market Share by
Country in 2025

Figure 49. Americas Phase Change Immersion Cooling System Revenue Market Share
by Country (2021-2026)

Figure 50. Americas Phase Change Immersion Cooling System Sales Market Share by
Type (2021-2026)

Figure 51. Americas Phase Change Immersion Cooling System Sales Market Share by
Application (2021-2026)

Figure 52. United States Phase Change Immersion Cooling System Revenue Growth
2021-2026 (\$ millions)

Figure 53. Canada Phase Change Immersion Cooling System Revenue Growth
2021-2026 (\$ millions)

Figure 54. Mexico Phase Change Immersion Cooling System Revenue Growth
2021-2026 (\$ millions)

Figure 55. Brazil Phase Change Immersion Cooling System Revenue Growth
2021-2026 (\$ millions)

Figure 56. APAC Phase Change Immersion Cooling System Sales Market Share by
Region in 2025

Figure 57. APAC Phase Change Immersion Cooling System Revenue Market Share by
Region (2021-2026)

Figure 58. APAC Phase Change Immersion Cooling System Sales Market Share by
Type (2021-2026)

Figure 59. APAC Phase Change Immersion Cooling System Sales Market Share by
Application (2021-2026)

Figure 60. China Phase Change Immersion Cooling System Revenue Growth
2021-2026 (\$ millions)

Figure 61. Japan Phase Change Immersion Cooling System Revenue Growth
2021-2026 (\$ millions)

Figure 62. South Korea Phase Change Immersion Cooling System Revenue Growth
2021-2026 (\$ millions)

Figure 63. Southeast Asia Phase Change Immersion Cooling System Revenue Growth
2021-2026 (\$ millions)

Figure 64. India Phase Change Immersion Cooling System Revenue Growth 2021-2026
(\$ millions)

Figure 65. Australia Phase Change Immersion Cooling System Revenue Growth
2021-2026 (\$ millions)

Figure 66. China Taiwan Phase Change Immersion Cooling System Revenue Growth 2021-2026 (\$ millions)

Figure 67. Europe Phase Change Immersion Cooling System Sales Market Share by Country in 2025

Figure 68. Europe Phase Change Immersion Cooling System Revenue Market Share by Country (2021-2026)

Figure 69. Europe Phase Change Immersion Cooling System Sales Market Share by Type (2021-2026)

Figure 70. Europe Phase Change Immersion Cooling System Sales Market Share by Application (2021-2026)

Figure 71. Germany Phase Change Immersion Cooling System Revenue Growth 2021-2026 (\$ millions)

Figure 72. France Phase Change Immersion Cooling System Revenue Growth 2021-2026 (\$ millions)

Figure 73. UK Phase Change Immersion Cooling System Revenue Growth 2021-2026 (\$ millions)

Figure 74. Italy Phase Change Immersion Cooling System Revenue Growth 2021-2026 (\$ millions)

Figure 75. Russia Phase Change Immersion Cooling System Revenue Growth 2021-2026 (\$ millions)

Figure 76. Middle East & Africa Phase Change Immersion Cooling System Sales Market Share by Country (2021-2026)

Figure 77. Middle East & Africa Phase Change Immersion Cooling System Sales Market Share by Type (2021-2026)

Figure 78. Middle East & Africa Phase Change Immersion Cooling System Sales Market Share by Application (2021-2026)

Figure 79. Egypt Phase Change Immersion Cooling System Revenue Growth 2021-2026 (\$ millions)

Figure 80. South Africa Phase Change Immersion Cooling System Revenue Growth 2021-2026 (\$ millions)

Figure 81. Israel Phase Change Immersion Cooling System Revenue Growth 2021-2026 (\$ millions)

Figure 82. Turkey Phase Change Immersion Cooling System Revenue Growth 2021-2026 (\$ millions)

Figure 83. GCC Countries Phase Change Immersion Cooling System Revenue Growth 2021-2026 (\$ millions)

Figure 84. Manufacturing Cost Structure Analysis of Phase Change Immersion Cooling System in 2026

Figure 85. Manufacturing Process Analysis of Phase Change Immersion Cooling

System

Figure 86. Industry Chain Structure of Phase Change Immersion Cooling System

Figure 87. Channels of Distribution

Figure 88. Global Phase Change Immersion Cooling System Sales Market Forecast by Region (2027-2032)

Figure 89. Global Phase Change Immersion Cooling System Revenue Market Share Forecast by Region (2027-2032)

Figure 90. Global Phase Change Immersion Cooling System Sales Market Share Forecast by Type (2027-2032)

Figure 91. Global Phase Change Immersion Cooling System Revenue Market Share Forecast by Type (2027-2032)

Figure 92. Global Phase Change Immersion Cooling System Sales Market Share Forecast by Application (2027-2032)

Figure 93. Global Phase Change Immersion Cooling System Revenue Market Share Forecast by Application (2027-2032)

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