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Global Solid-State Cooling Technology Market Growth (Status and Outlook) 2026-2032

https://marketpublishers.com/r/G90762EED449EN.html
Date: October 2026
Pages: 74
Price: US$ 3,660.00 (Single User License)
ID: G90762EED449EN

Abstracts

The global Solid-State Cooling Technology market size is predicted to grow from US$ 7.28 million in 2025 to US$ 23.26 million in 2032; it is expected to grow at a CAGR of 11.3% from 2026 to 2032.

Solid-State Cooling Technology in this study refers to active thermal-management technologies that generate cooling airflow without conventional rotating fans, primarily using electrohydrodynamic (EHD), ionic-wind, plasma-actuator or related solid-state mechanisms. Electric fields or electrically driven microstructures generate and direct airflow across heat-generating components, enabling compact, low-vibration and low-noise thermal architectures. The technology is particularly relevant to space-constrained electronics such as notebooks, edge AI systems, servers, industrial electronics and aerospace electronics. Ventiva, Ionic Wind, YPlasma, Cedrion and Fusion Dynamics represent emerging EHD/plasma-based approaches, while Frore Systems represents an established alternative solid-state active-cooling architecture.

Key Findings

Solid-state cooling is moving from laboratory development toward commercial electronics integration

EHD and plasma-actuator technologies eliminate conventional rotating fan mechanisms

Consumer electronics and edge AI devices are important near-term adoption markets

AI computing density is creating stronger demand for compact active thermal solutions

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Commercial maturity varies significantly among competing solid-state cooling architectures

Market Trends

The market is evolving toward thinner modules, higher heat-removal capability, lower acoustic output and tighter integration with processors and heat spreaders. EHD ionic-wind developers are improving electrode geometry, airflow velocity, ozone management and high-voltage control, while DBD plasma approaches seek very thin actuator structures that can be integrated directly around thermal hotspots. At the same time, commercially deployed solid-state cooling chips are demonstrating that the category can progress beyond prototypes into OEM products, increasing pressure on emerging plasma and ionic-wind developers to improve manufacturability, reliability and cost.

Market Dynamics

Drivers

Rising processor power density, on-device AI workloads and thinner electronic form factors are the principal demand drivers. Conventional fans consume valuable internal volume and introduce noise, vibration and mechanical wear, creating limitations for compact devices. Solid-state cooling can provide targeted airflow in thinner configurations and therefore offers particular value in notebooks, tablets, edge AI equipment and other systems where space and acoustics are critical design constraints.

Restraints

The main restraints are manufacturing maturity, high-voltage power electronics, airflow-to-power efficiency, thermal-system integration and cost. EHD and plasma systems must also control discharge behavior and by-products such as ozone while maintaining stable airflow over long operating periods. For OEM adoption, suppliers must demonstrate reliability, safety, electromagnetic compatibility and consistent thermal performance under real product operating conditions.

Opportunities

The strongest near-term opportunities are in premium notebooks, tablets, compact AI systems and edge computing devices, where higher processor performance increasingly conflicts with limitations on product thickness and acoustic noise. Longer-

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term opportunities extend to AI servers, industrial power electronics, automotive electronics and aerospace systems. Ionic Wind is targeting high-performance computing and data-center-related applications, while Fusion Dynamics and Cedrion are also developing technologies for industrial, mobility and aerospace environments.

Challenges

A major challenge is achieving sufficient airflow and heat-transfer performance at competitive power consumption while retaining the key advantages of compact size and low noise. The industry must also transition from customized prototypes to repeatable high-volume manufacturing. Customer qualification is demanding because a cooling technology directly affects processor performance, device reliability and product safety, making OEMs relatively conservative when replacing established fan-based architectures.

Industry Chain Analysis

The upstream segment includes electrode materials, dielectric materials, semiconductor and high-voltage control components, ceramic or polymer substrates, thermal-interface materials and precision microfabrication processes. Midstream companies develop EHD airflow modules, DBD plasma actuators and other solid-state active-cooling devices, together with associated drive electronics and thermal-control software. Downstream applications include consumer electronics, AI servers and data centers, industrial electronics and aerospace equipment. As commercialization progresses, value creation is shifting from the actuator alone toward complete thermal subsystems optimized jointly with heat sinks, processors and enclosure design.

Segment Insights

By technology, Electro Hydro Dynamic (EHD) cooling uses electric fields to ionize and accelerate air molecules, generating ionic wind without a rotating fan. Ventiva and Ionic Wind are representative developers of this approach, while Fusion Dynamics also develops an EHD platform. Dielectric Barrier Discharge (DBD) uses dielectric-covered electrodes to generate controlled plasma-induced airflow and is represented by companies such as YPlasma; Fusion Dynamics also identifies DBD as a primary actuator architecture. For market segmentation, the two categories can be retained, although DBD is technically related to the broader electrohydrodynamic/plasma-actuator family rather than being completely independent from EHD.

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By commercialization stage, the supplier base spans Prototyping Stage, Early Commercialization Stage and Mass Production Stage. Ionic Wind was still advancing certification and market-readiness activities following its 2025 financing, while YPlasma demonstrated consumer-electronics cooling at CES 2026. Ventiva has progressed further toward product and OEM integration. Outside the initial company list, Frore Systems is an important mass-commercialization benchmark, with AirJet products already integrated into commercially available electronics.

Downstream Market Opportunities

Consumer Electronics is currently one of the clearest commercialization opportunities because notebooks, tablets and compact devices benefit directly from thinner, quieter cooling. AI Servers / Data Centers offer substantial longer-term potential as computing density increases, although cooling-power requirements are significantly higher. Industrial Electronics benefits from reduced mechanical wear and vibration, while Aerospace applications value low weight, compactness and reliability. The application structure in the attachment therefore broadly reflects the principal addressable markets for emerging solid-state active cooling technologies.

Regional Insights

North America is an important commercialization and technology-development center, supported by Ventiva and Frore Systems as well as YPlasma's U.S. operations. Europe has an active emerging ecosystem including Switzerland-based Ionic Wind, Spain-based Cedrion and the European development activities of YPlasma. Fusion Dynamics has roots and development activities in the United Kingdom while also expanding its U.S. presence. The competitive landscape is therefore internationally distributed, but advanced electronics customers and Asian manufacturing ecosystems are expected to play an important role in eventual volume deployment.

Competitive Landscape Analysis

The solid-state cooling technology market remains an emerging and technologically fragmented field. Within the EHD/plasma segment, Ventiva is among the more advanced companies in electronics-oriented ionic cooling, while Ionic Wind is progressing from research spin-off technology toward industrialization. YPlasma emphasizes DBD plasma actuators, Cedrion develops ionic-wind and cold-plasma cooling for electronics, and Fusion Dynamics is building an EHD/DBD cooling platform targeting electronics, data centers and aerospace. Frore Systems should be added to

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the broader competitive landscape because its AirJet platform is already commercially deployed and provides an important benchmark for solid-state active cooling, although its technical architecture differs from the EHD/DBD routes emphasized in the attachment. Competition is increasingly centered on cooling density, module thickness, acoustic performance, power consumption, reliability and manufacturability rather than simply eliminating the mechanical fan.

Report Scope

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Solid-State Cooling Technology 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 Solid-State Cooling Technology.

This report presents a comprehensive overview, market shares, and growth opportunities of Solid-State Cooling Technology market by product type, application, key players and key regions and countries.

Market Segmentation

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Segmentation by Type:

Electro Hydro Dynamic (EHD)

Dielectric Barrier Discharge (DBD)

Segmentation by Technology Maturity:

Prototyping Stage

Early Commercialization Stage

Mass Production Stage

Segmentation by Application:

Consumer Electronics

AI Servers / Data Centers

Industrial Electronics

Aerospace

Others

This report also splits the market by region:

Americas

United States

Canada

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- Mexico
- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey

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GCC Countries

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

Ventiva

Ionic Wind

YPlasma

Cedrion

Fusion Dynamics

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