

Immersion Cooling Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product (Single-phase, Two-phase), By Application (Edge Computing, High-performance Computing, Cryptocurrency Mining, Artificial Intelligence, Others), By Cooling Liquid (Mineral Oil, Fluorocarbon-based Fluids, Deionized Water, Others), By Region, By Competition, 2018-2028

<https://marketpublishers.com/r/l86155AF9482EN.html>

Date: November 2023

Pages: 178

Price: US\$ 4,900.00 (Single User License)

ID: l86155AF9482EN

Abstracts

Global Immersion Cooling Market was valued at USD 205 Million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 23.4% through 2028. The Global Immersion Cooling Market is experiencing robust growth, driven by the escalating demand for energy-efficient and high-performance cooling solutions in data centers. As businesses increasingly rely on data-intensive applications, traditional cooling methods are proving inadequate, leading to the adoption of innovative technologies like immersion cooling. This method involves submerging IT hardware directly into non-conductive cooling fluids, ensuring optimal temperature regulation. Immersion cooling offers superior cooling efficiency, reducing energy consumption and operational costs significantly. Moreover, it enhances the lifespan and performance of servers, ensuring seamless operations for businesses. The market is witnessing substantial investments in research and development, leading to the development of advanced cooling solutions. Key players are focusing on partnerships and collaborations to expand their market presence and offer cutting-edge immersion cooling solutions. Additionally, the growing awareness about environmental sustainability is driving the market, as immersion cooling minimizes the carbon footprint of data centers. With industries embracing digital transformation and the proliferation of

data-driven technologies, the Global Immersion Cooling Market is poised for continuous expansion, catering to the evolving cooling needs of modern enterprises.

Key Market Drivers

Growing Data Center Demand

The Global Immersion Cooling Market is being dramatically propelled by the surging demand for innovative cooling solutions in data centers. In today's digitally interconnected world, data centers form the backbone of virtually every industry, supporting a myriad of processes from cloud computing to artificial intelligence. With the proliferation of data-intensive applications, the heat generated by servers and other hardware components has reached unprecedented levels, challenging traditional air-based cooling systems. In this scenario, immersion cooling has emerged as a revolutionary solution. By submerging IT hardware directly into specialized cooling fluids, this technology dissipates heat far more efficiently than air-based methods. This unparalleled cooling efficiency is crucial for ensuring the optimal performance and longevity of high-powered computing systems, making it indispensable in the modern data-driven landscape.

As businesses continue their digital transformations, the demand for data storage and processing capabilities has soared. Big data analytics, artificial intelligence algorithms, and IoT applications are generating colossal volumes of data, necessitating larger and more powerful data centers. Consequently, data center operators are increasingly turning to immersion cooling to address the escalating thermal challenges. Immersion cooling not only enables these data centers to handle the heat generated by advanced computing systems but also enhances their overall energy efficiency. By significantly reducing the energy required for cooling, immersion solutions offer a sustainable, cost-effective alternative to traditional cooling methods. This energy efficiency not only aligns with businesses' environmental sustainability goals but also substantially cuts operational costs in the long run.

Moreover, as the demand for cloud-based services continues to rise, data centers are evolving to accommodate these requirements. Cloud service providers are adopting immersion cooling to optimize their operations, ensuring reliable, uninterrupted services for their clients. Additionally, industries such as finance, healthcare, and manufacturing, which heavily rely on real-time data analysis and processing, are increasingly investing in cutting-edge data centers equipped with immersion cooling technology. As the data center landscape becomes increasingly competitive, businesses are recognizing the

strategic advantage of investing in immersion cooling solutions. The technology not only addresses the immediate need for efficient cooling but also future-proofs data centers, making them agile and adaptable to the evolving demands of the digital age. In essence, the growing demand for data center capacity and the need for energy-efficient, high-performance cooling are driving the rapid expansion of the Global Immersion Cooling Market, positioning it as a cornerstone technology in the data-centric future of industries worldwide.

Energy Efficiency and Sustainability

The surge in the Global Immersion Cooling Market can be predominantly attributed to the compelling imperatives of energy efficiency and sustainability in the contemporary business landscape. As corporations increasingly grapple with the environmental impact of their operations, data centers, vital hubs of digital infrastructure, have come under scrutiny due to their substantial energy consumption. Immersion cooling emerges as a transformative solution, drastically enhancing energy efficiency by leveraging innovative techniques. Unlike traditional air-based cooling systems, immersion cooling submerges IT hardware in specially engineered dielectric fluids, dissipating heat with exceptional efficiency. This process reduces the energy expenditure associated with cooling mechanisms significantly. This reduction holds profound implications for both operational costs and environmental conservation. By optimizing energy usage, businesses not only cut down on their operational expenditures but also align their strategies with global sustainability goals. The technology ensures that the colossal amounts of energy required to sustain data centers do not translate into excessive carbon emissions, thereby mitigating their environmental footprint. Consequently, immersion cooling has become a linchpin in the endeavor to transition toward greener, more sustainable business practices, resonating with stakeholders, investors, and environmentally conscious consumers alike.

Moreover, the emphasis on sustainability is not just a matter of compliance but a competitive advantage. Companies demonstrating a commitment to eco-friendly operations and reduced energy consumption are increasingly gaining market favor. Environmental consciousness has permeated consumer choices and corporate partnerships, making sustainability a core criterion for decision-making. Embracing immersion cooling technologies, which dramatically decrease the reliance on energy-intensive cooling infrastructures, showcases a business's dedication to sustainability. This commitment bolsters brand reputation, fosters customer loyalty, and attracts socially responsible investors. Beyond the immediate advantages, it future-proofs businesses against impending regulatory shifts and positions them as pioneers in the

green technology sphere. Consequently, the synergy of energy efficiency and sustainability propels the Global Immersion Cooling Market forward, not merely as a technological advancement but as a pivotal force shaping the ethical and competitive landscape of businesses worldwide.

Digital Transformation and Industry 4.0

The Global Immersion Cooling Market is undergoing a seismic shift catalyzed by the relentless wave of digital transformation and the advent of Industry 4.0. As industries worldwide undergo profound digitization, generating unprecedented volumes of data, the demand for efficient data centers has reached unprecedented heights. Traditional cooling methods struggle to keep pace with the escalating heat density of modern computing hardware, making innovation imperative. Immersion cooling has emerged as the linchpin of this technological evolution, aligning seamlessly with the tenets of Industry 4.0. By submerging IT components in dielectric fluids, it ensures optimal operating temperatures, unlocking unparalleled processing power and data storage capabilities. In the realm of digital transformation, where real-time data analysis and AI-driven insights reign supreme, the efficiency of data centers is paramount. Immersion cooling not only resolves the heat dissipation challenges but also enhances the longevity and reliability of critical hardware. Moreover, Industry 4.0, characterized by interconnected smart devices and autonomous systems, necessitates data centers to be not just efficient but also agile and responsive. Immersion cooling, with its ability to scale effortlessly and accommodate high-performance computing, dovetails perfectly with the demands of this industrial revolution. It enables businesses to process and analyze colossal datasets at lightning speed, empowering them to make data-driven decisions and optimize operations in real-time. As companies across sectors rush to embrace the transformative potential of Industry 4.0, the Global Immersion Cooling Market stands as an indispensable ally, ensuring the backbone of this revolution—the data centers—function with unprecedented efficiency, resilience, and speed. The symbiotic relationship between digital transformation, Industry 4.0, and immersion cooling delineates a trajectory where innovation converges with necessity, driving the market into a future defined by intelligent, interconnected, and highly efficient data ecosystems.

Technological Advancements and Research Investments

The Global Immersion Cooling Market is propelled by a relentless march of technological advancements and strategic research investments that are reshaping the landscape of data center cooling solutions. In an era where computational demands are

skyrocketing, traditional cooling methods struggle to maintain efficiency. Here, immersion cooling emerges as the vanguard of innovation, fundamentally transforming how data centers dissipate heat. Pioneering companies are investing significantly in research and development, exploring cutting-edge materials, advanced heat transfer technologies, and novel cooling fluids. These investments yield groundbreaking solutions that push the boundaries of what's possible, ensuring data centers operate at peak performance. Moreover, the synergy between academia and industry fuels a cycle of innovation. Research institutions and technology companies collaborate to explore new frontiers, leading to the development of more efficient and sustainable immersion cooling systems. These advancements are not mere luxuries but imperatives in the age of Big Data and artificial intelligence, where the processing of massive datasets necessitates unprecedented computing power. As a result, research investments are strategic imperatives, ensuring that businesses stay ahead in the competitive digital landscape. These cutting-edge technologies are not only enhancing the energy efficiency of data centers but also extending the lifespan of computing hardware, optimizing operational costs, and reducing the environmental footprint. In essence, the symbiotic relationship between technological advancements and research investments is steering the Global Immersion Cooling Market toward a future where data centers are not only powerful hubs of computation but also exemplars of sustainability, efficiency, and innovation. The market's trajectory is defined by a continual pursuit of excellence, where each innovation paves the way for the next, fostering a dynamic ecosystem where businesses, researchers, and technology enthusiasts collaborate to redefine the very fabric of data center infrastructure.

Cost-Efficiency and Total Cost of Ownership

Cost-efficiency and a strategic focus on total cost of ownership are paramount drivers steering the Global Immersion Cooling Market. As data centers become the backbone of modern enterprises, optimizing operational expenses without compromising performance is critical. Immersion cooling solutions offer a transformative approach by significantly reducing the total cost of ownership over the system's lifecycle. While the initial investment might seem substantial, these systems provide unparalleled energy efficiency, enabling businesses to curtail their utility bills drastically. The immersive cooling fluids utilized not only dissipate heat more effectively than traditional air-cooling methods but also enhance the longevity of computing hardware, reducing the frequency of replacements and associated costs. Additionally, the streamlined maintenance and simplified infrastructure requirements further contribute to long-term savings. In the competitive realm of data management, where margins are often razor-thin, the ability to cut down operational expenses is a strategic advantage. Decision-makers are

increasingly recognizing the substantial financial benefits associated with immersion cooling, driving a surge in adoption globally. Companies are shifting their focus from mere upfront costs to the comprehensive financial picture, factoring in operational efficiency, reduced downtimes, and prolonged equipment lifespan. This shift in perspective aligns with the broader business goal of ensuring sustainable growth and profitability. The Global Immersion Cooling Market is witnessing a paradigm shift where businesses are not only embracing cutting-edge cooling solutions for their immediate benefits but also for the unparalleled long-term cost savings they offer. This strategic shift is reshaping the market dynamics, prompting businesses across industries to invest in immersion cooling technologies as a cornerstone of their cost-effective and sustainable data center strategies. In essence, the focus on cost-efficiency and total cost of ownership is steering the Global Immersion Cooling Market toward a future where businesses operate data centers with unprecedented financial prudence, ensuring that every investment yields optimal returns and fuels sustainable growth.

Key Market Challenges

Compatibility and Fragmentation

The Global Immersion Cooling Market faces significant challenges due to compatibility and fragmentation issues. Various immersion cooling standards exist, leading to complexities in system integration. Diverse cooling methods, such as single-phase and two-phase immersion cooling, add to the confusion. The absence of standardized protocols forces businesses to invest in specific cooling solutions, limiting flexibility and hindering industry-wide adoption. With emerging technologies, like direct-to-chip immersion cooling, gaining traction, the market experiences further fragmentation, making it crucial for industry stakeholders to collaborate and establish universal standards for seamless integration.

Counterfeit and Low-Quality Products

Counterfeit and substandard immersion cooling solutions pose threats to user safety and equipment integrity. Inadequately manufactured cooling fluids can lead to system overheating or corrosion, jeopardizing the reliability of data centers. Addressing this challenge demands stringent quality control measures and heightened consumer awareness. Establishing certification programs and industry standards can assist consumers in identifying genuine and high-quality immersion cooling solutions, ensuring the safety and longevity of their investments.

Environmental Impact

The Immersion Cooling Market contributes to environmental concerns, primarily related to cooling fluid disposal and energy consumption. Inadequate disposal practices can contaminate natural water sources and harm ecosystems. To mitigate this, the industry must invest in sustainable practices, encouraging responsible disposal and recycling methods for cooling fluids. Additionally, the energy-intensive nature of immersion cooling demands innovations in energy-efficient cooling systems. Manufacturers need to focus on developing eco-friendly cooling fluids and systems that reduce the overall environmental footprint, aligning with global initiatives for a greener future.

Standardization and Regulation

The absence of standardized guidelines and regulations in the Immersion Cooling Market poses challenges to manufacturers and consumers alike. The lack of universally accepted safety and efficiency standards can lead to inconsistent product quality and hinder market growth. Regulatory bodies and industry associations must collaborate to establish comprehensive standards, ensuring the safety, performance, and environmental impact of immersion cooling solutions. Manufacturers need to invest in rigorous testing and compliance measures, adhering to evolving regulations related to electrical safety, environmental impact, and electromagnetic interference. Meeting these standards not only ensures market compliance but also builds consumer trust, fostering a conducive environment for the industry's sustainable growth.

Technological Innovation and Research Investment

Rapid technological advancements and substantial research investments are imperative in addressing the challenges faced by the Immersion Cooling Market. Investments in research and development can lead to the creation of efficient, eco-friendly cooling fluids and systems. Embracing innovative solutions such as phase-change materials and advanced thermal management techniques can revolutionize the industry, enhancing energy efficiency and system performance. Collaboration between industry players, research institutions, and government bodies can drive innovation, paving the way for groundbreaking advancements that address environmental concerns and establish industry-wide standards. Industry stakeholders must prioritize continuous research and technological innovation to navigate the evolving landscape of immersion cooling, ensuring sustainable growth and environmental responsibility.

Key Market Trends

Increased Adoption of Data-Intensive Technologies

The Global Immersion Cooling Market is witnessing a significant uptick in growth due to the increased adoption of data-intensive technologies across industries. As businesses embrace big data analytics, artificial intelligence, and high-performance computing, the demand for efficient and innovative cooling solutions has surged. Immersion cooling has emerged as a game-changer, especially in data centers and supercomputing facilities, where traditional cooling methods struggle to keep up with the escalating heat generated by advanced computing systems. The market is experiencing a paradigm shift as companies recognize the benefits of immersion cooling in enhancing performance, reducing energy consumption, and extending the lifespan of electronic components. The growing reliance on data-driven insights and complex computational tasks propels the Immersion Cooling Market forward, positioning it as an indispensable element in the rapidly evolving landscape of data-intensive technologies.

Rapid Technological Advancements and Customization

Similar to the Immersion Cooling market, the Immersion Cooling Market is characterized by rapid technological advancements aimed at optimizing cooling efficiency and customization. Manufacturers are continually innovating to develop immersion cooling solutions tailored to specific industries and applications. Advanced cooling fluids, phase-change materials, and immersive cooling architectures are at the forefront of these innovations. Additionally, there is a growing trend toward modular and scalable immersion cooling systems, allowing businesses to customize their cooling setups based on their unique requirements. These advancements are not only enhancing the cooling performance but also addressing challenges related to space constraints and scalability. As industries diversify their technological infrastructures, the demand for specialized and technologically sophisticated immersion cooling solutions continues to rise, fostering a market environment defined by innovation and adaptability.

Focus on Sustainability and Eco-Friendly Solutions

Sustainability has become a driving force in the Immersion Cooling Market, mirroring the trends observed in the Immersion Cooling industry. With environmental conservation taking center stage globally, businesses are increasingly inclined toward eco-friendly cooling solutions. Immersion cooling, inherently more energy-efficient than traditional methods, aligns with the growing emphasis on green technologies. Manufacturers are investing in research and development to create cooling fluids that

are both efficient and environmentally friendly, minimizing the ecological impact of cooling operations. Additionally, the market is witnessing the emergence of initiatives aimed at responsible disposal and recycling of cooling fluids, addressing concerns related to electronic waste. As companies and governments prioritize sustainability, the Immersion Cooling Market is poised to evolve, offering not just advanced cooling technologies but also eco-conscious solutions that contribute to a greener and more sustainable future.

Integration of Edge Computing and IoT Devices

The integration of edge computing and the proliferation of Internet of Things (IoT) devices are reshaping the Immersion Cooling Market. Edge computing brings computational resources closer to the data source, reducing latency and enhancing real-time processing capabilities. As edge computing infrastructures expand, the demand for efficient cooling solutions at the edge grows in tandem. Immersion cooling, with its compact and efficient design, is well-suited for edge deployments, ensuring reliable cooling in space-constrained environments. Moreover, the rising deployment of IoT devices across various sectors necessitates effective cooling solutions to maintain optimal performance and prevent overheating. Immersion cooling addresses these challenges, providing a scalable and efficient cooling method for IoT devices. The integration of edge computing and IoT devices not only fuels the demand for immersion cooling solutions but also opens new avenues for innovation, driving the market toward a future where seamless integration and efficient cooling are paramount.

Digital Transformation in Manufacturing and Industry 4.0 Initiatives

Digital transformation in the manufacturing sector, coupled with the widespread adoption of Industry 4.0 initiatives, is driving the Immersion Cooling Market toward unprecedented growth. Manufacturing facilities are embracing automation, artificial intelligence, and robotics to enhance productivity and efficiency. These technologies generate substantial heat, necessitating advanced cooling solutions to maintain operational integrity. Immersion cooling offers an effective remedy by efficiently dissipating the generated heat, ensuring uninterrupted manufacturing processes. Industry 4.0 initiatives, focusing on smart factories and interconnected systems, further accelerate the demand for innovative cooling technologies. Immersion cooling solutions enable manufacturers to deploy high-performance computing systems, facilitating real-time data analysis and predictive maintenance. As the manufacturing landscape undergoes a digital revolution, the Immersion Cooling Market stands as a cornerstone, enabling the seamless integration of cutting-edge technologies and fueling the evolution

toward smarter and more efficient industrial environments.

Segmental Insights

Product Insights

Single-phase led the industry and accounted for 70.7% of the global revenue share in 2022. This can be attributed to the low tank & coolant costs, high dielectric strength, low environmental impact, high coolant heat capacity, and high biodegradability of a two-phase system. Single-phase system is an inexpensive, efficient, and simple cooling technique, wherein electrical components, sub-systems, and devices are fully immersed in the single-phase dielectric heat transfer fluid. The single-phase system stays in the liquid state during the entire cooling process.

The demand for two-phase systems is expected to witness growth at a CAGR of 23.0% over the forecast period due to improved reliability, high energy efficiency, deployment flexibility and low maintenance requirements. Two-phase systems have a power use effectiveness of 1.01, which is 5% lower than single-phase systems, making them a suitable cooling solution for hyperscale data centers. As the coolants in the two-phase system move to the gaseous phase, significant pressure is required. This necessitates complicated systems with significant safety features, which raises the overall maintenance and operation costs of the cooling system. Furthermore, when compared to single-phase cooling systems, fluorinated fluids used in two-phase systems are expensive, as is their replacement due to loss.

Cooling Liquid Insights

Mineral oil led the industry and accounted for 42.7% of the global revenue share in 2022. When compared to traditional air conditioning systems, mineral oil is more efficient, which simplifies facility design and results in cost savings. Mineral oil is used as a single-phase dielectric because of its high boiling point and because it is transparent and oily.

The ability of mineral oil to be combined from various sources and batches allows for greater flexibility during deployment and operations. Historically, mineral oil has been utilized as a dielectric cooling liquid for immersion cooling. However, problems such as low flash point inconsistent quality and material incompatibility have limited its use in the IT industry. The demand for fluorocarbon-based fluids is expected to witness growth at a CAGR of 24.4% over the forecast period. Hydrofluoroethers (HFEs), Perfluorocarbons

(PFCs), perfluoropolyethers (PFPEs), and fluorketones are the most often utilized fluorocarbon molecules in immersion cooling liquids (FKs). High chemical and thermal stability, high dielectric strength, and relatively high vapor pressure aid in the simple adoption of such cooling solutions for preserving IT equipment temperatures.

Deionized-water cooling systems are employed in many different applications, including electrical, metallurgy, electronics, research, nonelectric, and medical. The capacity of deionized water to prevent the risk of electrical arcing induced by static charge in the cooling circuit and deposit of minerals that restrict coolant flow is projected to increase its demand of deionized water in systems.

Application Insights

High-performance computing led the industry and accounted for 34.6% of the global revenue share in 2022. There are several operational advantages to using an immersion-cooling in computing, including lower latency, the potential for heat reuse programs in industrial and urban areas, fast deployment with edge-ready solutions, the ability to cool chip densities required for zero water waste. The demand for cryptocurrency is witnessing a significant rise owing to its ability to offer advantages like quick international transfers, a decentralized system, protection from fraud, and enhanced transactional security. This system is used in cryptocurrency mining to cool the systems/components which are typically overclocked to boost the hash rates. Immersion cooling systems help reduce operational and capital expenses of cryptocurrency operations.

The Artificial Intelligence (AI) segment is expected to grow at a CAGR of 26.3% over the forecast period. Factors such as the resurgence of a strong research focus on artificial intelligence (AI) in the U.S.; development and mass deployment of deep learning by Facebook, Google, Microsoft, and Amazon; rising demand for AI applications; and Israel's thriving AI ecosystem are contributing toward augmenting the load on AI servers is expected to drive industry growth. These systems are utilized to support large workloads in small and constrained places when a traditional cooling system is either unavailable or impractical. These methods contribute to lower energy consumption in edge deployments. Immersion liquid cooling facilitates deployment at the edge, where high-capacity power sources may not be accessible.

Regional Insights

North America led the industry and accounted for 35.8% of the global revenue share in

2022, owing to the widespread presence of large-scale data centers. To keep up with the digital economy's rapid expansion, data centers in North America are investing in new high-performance computing servers that operate at high speeds. The excess heat generated compels the data center cooling system to work harder, raising cooling costs and reducing revenues. The breakout of the COVID-19 pandemic in Europe highlighted data centers in 2020, while investor interest in this area has increased over the last five years. According to a Real Estate Europe poll released at the end of 2020, data centers were among the top ten industries to invest in, trailing only residential assets and logistical facilities.

The Asia Pacific is expected to witness a growth at a CAGR of 24.5% over the forecast period. Businesses across all industries are increasing their focus on IT scalability and resilience in anticipation of potential pandemic-like systemic crises by using hybrid and possibly colocation solutions. Furthermore, in Asia Pacific, technological service providers such as Software-as-a-Service (SaaS) and Platform-as-a-Service (PaaS) organizations consider public cloud providers for their service offerings. Major countries in Central and South America want to begin the construction of smart cities and IT infrastructure over the projected period. These countries' governments are taking substantial initiatives to fund smart cities and are asking private sector enterprises to install smart solutions in under-construction smart cities. These factors are likely to increase the deployment of IoT servers, data centers, gear, and devices in the region, resulting in rapid expansion of the industry over the forecast period.

Key Market Players

Fujitsu Limited

Dug Technology

Green Revolution Cooling Inc.

Submer

Liquid Stack

Midas Green Technologies

Asperitas

DCX- The Liquid Cooling Company

LiquidCool Solutions

ExaScaler Inc.

Report Scope:

In this report, the Global Immersion Cooling Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Immersion Cooling Market, By Product:

Single-phase

Two-phase

Immersion Cooling Market, By Application:

Edge Computing

High-performance Computing

Cryptocurrency Mining

Artificial Intelligence

Others

Immersion Cooling Market, By Cooling Liquid:

Mineral Oil

Fluorocarbon-based Fluids

Deionized Water

Others

Immersion Cooling Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Belgium

Asia-Pacific

China

India

Japan

Australia

South Korea

Indonesia

Vietnam

South America

Brazil

Argentina

Colombia

Chile

Peru

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Immersion Cooling Market.

Available Customizations:

Global Immersion Cooling market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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