

## **Data Centre Liquid Immersion Cooling Market Report and Forecast 2025-2034**

Market Report | 2025-07-28 | 176 pages | EMR Inc.

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### **Report description:**

The global market for data centre liquid immersion cooling reached a value of about USD 1.47 Billion in 2024. The market is further estimated to grow at a CAGR of 18.30% in the forecast period of 2025-2034 to reach a value of around USD 7.89 Billion by 2034.

#### **Direct Cooling Segment to Propel the Data Centre Liquid Immersion Cooling Market Growth**

Based on the cooling method, the direct cooling segment is driving the growth of data centre liquid immersion cooling market. Direct liquid immersion cooling requires only a pump and so reduces the number of mechanical parts, thus improving the reliability of the cooling system. In addition, the two-phase immersion liquid cooling can avoid the surface temperature symmetry of electronic devices and guarantee their working environment, thereby invigorating the market expansion of data centre liquid immersion cooling. Moreover, the rising initiatives of the key players in providing hazardous-free biodegradable coolants are anticipated to impel the market in the forecast period.

#### **Rapid Digitalisation of the Economy is one of the Crucial Data Centre Liquid Immersion Cooling Market Trends**

The digitalisation of the economy is leading to increasing demand for data centres and the need for thermal management solutions, which is propelling the data centre liquid immersion cooling demand. The advent of the Internet of Things, 5G, artificial intelligence, cloud computing, big data and their applications is resulting in high energy consumption, which is significantly catalysing the market development of data centre liquid immersion cooling. In addition, it helps the data centre operators lower energy expenses and is environmentally friendly as the liquid immersion cooling helps overcome the increasing operating temperature of computer servers.

Moreover, the government initiatives in developing the nations into data hubs are playing a critical role in the market expansion of data centre liquid immersion cooling. The efforts taken by the key players in introducing liquid immersion cooling systems with advanced features are likely to aid the market for data centre liquid immersion cooling in the forecast period.

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## Recent Developments

As per the data centre liquid immersion cooling market dynamics and trends, LiquidStack announced an innovative single-phase liquid cooling solution which can enhance the efficiency and sustainability of data centres. This cooling solution can support the high-density processing needs of data centres.

## Industry Outlook

According to the data centre liquid immersion cooling industry analysis, the data centre capacity in India is expected to be more than 1,800 megawatts (Mw) by 2026. The country is expected to add around 850 Mw of data centres between 2024-26 as per the data from the real estate consultancy CBRE South Asia. India has the highest capacity of the data centre in the Asia Pacific region, followed by Japan and Australia. The country has also secured investments worth USD 40 billion from both domestic and international investors in the time period of 2018 to 2023. The cities of Mumbai and Chennai account for around 68 per cent of the total data centre stock in the country.

As per the industry reports, the US accounted for around 40% of the data centre market and the power consumption in the country is expected to reach 35 GW by 2030. With the emergence of the AI technology, the demand for data centre has also gone up as they host high-end GPUs to support AI. This is expected to boost the growth of the data centre liquid immersion cooling industry to maintain the superior performance of data centres.

Microsoft has been instigating a two-phase liquid immersion cooling solution in which servers can be submerged into engineering fluids to improve cooling efficiency and dissipate heat. This method can reduce power consumption by 5% to 15% and increase the energy efficiency in data centres, which can also contribute to the data centre liquid immersion cooling industry revenue.

## Increasing Demand for Efficient Cooling Solutions and Technological Innovations Enhancing the Global Data Centre Liquid Immersion Cooling Market Share

- Growing demand for data centers and cloud services driving the need for efficient cooling solutions.
- Technological advancements in liquid immersion cooling improving efficiency and performance and aid data centre liquid immersion cooling demand growth.
- Strong regulatory support for energy-efficient data center operations and reduced carbon footprint.

## High Costs and Limited Awareness Restricting the Global Data Centre Liquid Immersion Cooling Market

- High initial costs associated with liquid immersion cooling systems.
- Limited awareness and adoption in smaller data centers and enterprises.
- Complexity in implementation and maintenance compared to traditional cooling methods can negatively impact data centre liquid immersion cooling demand forecast.
- Dependence on availability and price fluctuations of specialized coolants.

Expansion of Liquid Immersion Cooling Applications in Emerging Markets with Growing Data Center Infrastructure.

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- Increasing investments in data center modernization and energy-efficient technologies.
- Rising demand for high-performance computing and AI applications requiring advanced cooling solutions.
- Growing focus on sustainable and environmentally friendly data center operations is a crucial trend in data centre liquid immersion cooling market.

#### Key Market Players in the Global Market and their Competitive Strategies

The global data centre liquid immersion cooling market is highly competitive, dominated by major players like Green Revolution Cooling Inc., Submer Technologies, Asperitas, and LiquidStack. Each company employs distinct strategies to maintain and expand its market presence, contributing to a dynamic and challenging market environment.

#### Green Revolution Cooling Inc.

- Develop proprietary cooling fluids with enhanced thermal conductivity and safety features.
- Investing in expanding production capabilities to meet the growing demand from hyperscale data centers can increase data centre liquid immersion cooling market value.
- Form strategic partnerships with leading data center operators to co-develop customized cooling solutions.

#### Submer Technologies

- Focus on modular and easily deployable liquid immersion cooling systems to cater to different data center needs.
- Enhancing sustainability efforts by using eco-friendly coolants and reducing energy consumption can contribute to data centre liquid immersion cooling market revenue.

#### Asperitas

- Pioneer the development of compact and space-saving liquid immersion cooling units for urban data centers.
- Collaborate with renewable energy providers to integrate green energy solutions into cooling systems.
- Introducing a range of high-performance cooling solutions specifically designed for edge computing and remote data centres can increase data centre liquid immersion cooling market opportunities.

#### LiquidStack

- Innovate with high-density liquid immersion cooling systems that maximize cooling efficiency and space utilization.
- Establish a dedicated research center focused on enhancing the efficiency and lifespan of cooling solutions.
- Expand market presence in Asia-Pacific through targeted marketing campaigns and local partnerships with data center operators.

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## Data Centre Liquid Immersion Cooling Industry Segmentations

The data centre liquid immersion cooling draws heat from the data centre equipment and maintains the optimal performance of the computing infrastructure. The immersion cooling is done by submerging the data centre components in a dielectric coolant with low electrical conductivity. The fluids used in immersion cooling include deionised water, mineral oil, fluorocarbon-based fluids, and synthetic fluids.

### Market Breakup by Coolant Type

- Synthetic Coolants
- Natural Ester Coolants
- Hydrocarbon Coolants
- Fluorinated Coolants

### Market Breakup by Cooling Method

- Direct Cooling
- ??- Single-Phase Immersion Liquid Cooling
- ??- Two-Phase Closed or Semi-Open Immersion Liquid Cooling
  
- Indirect Cooling

### Market Breakup by Application

- Small and Medium-Sized Data Centres
- Enterprise Data Centres
- Large Data Centres

### Market Breakup by End Use

- Banking And Finance
- IT and Telecom
- Healthcare
- Academics
- Government
- Energy
- Others

### Market Breakup by Region

- North America
- Europe
- Asia Pacific
- Latin America
- Middle East and Africa

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## Competitive Landscape

The report gives a detailed analysis of the following key players in the global data centre liquid immersion cooling market, covering their competitive landscape, capacity, and latest developments like mergers, acquisitions, and investments, expansions of capacity, and plant turnarounds:

- Alfa Laval Corporate AB
- Bitfury Group Limited
- Asetek, Inc.
- Chilldyne, Inc.
- CoolIT Systems Inc.
- Others

The comprehensive EMR report provides an in-depth assessment of the market based on the Porter's five forces model along with giving a SWOT analysis.

### Data Centre Liquid Immersion Cooling Market Regional Analysis

#### North America to Account for a Substantial Share in the Market for Data Centre Liquid Immersion Cooling

The rising number of data centres in the North American region and the strong foothold of leading solution providers are leading to the vast demands for energy efficiency in data centres, thereby fuelling the demand of data centre liquid immersion cooling market. In addition, the rapid technological advancements in the region, such as artificial intelligence and 5G, require more data processing, storage, and maintenance, resulting in the expansion of the market.

Meanwhile, the Asia Pacific region is also expected to provide impetus to data centre liquid immersion cooling owing to the developing IT infrastructure in the area. The Internet penetration and the rising usage of edtech, e-commerce, and digital transactions are playing a critical role in fuelling the market.

### Data Centre Liquid Immersion Cooling Market?Report Snapshots

Data Centre Liquid Immersion Cooling?Market Size

Data Centre Liquid Immersion Cooling Market Growth

Data Centre Liquid Immersion Cooling?Market Trends

Data Centre Liquid Immersion Cooling?Companies

Data Centre Liquid Immersion Cooling Market Regional Analysis

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