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Data Center Cooling Market in Americas - Industry Outlook and Forecast 2018-2023

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Abstracts

This market research report on the data center cooling market in Americas offers analysis on market size & forecast, market share, industry trends, growth drivers, and vendor analysis. The market study also includes insights on segmentation by cooling infrastructure (cooling system and other infrastructure), by cooling technique (air-based cooling and liquid-based cooling), by cooling systems (CRAC & CARH, chiller, cooling towers & dry coolers, and economizers & evaporative coolers), tier standards (tier 1 and tier 2, tier 3, and tier 4), and geography (North America and Latin America).

Data Center Cooling Market in Americas - Overview

The growing internet penetration and the rising development of data centers in the America region are driving the growth of the data center cooling market in Americas. The cooling systems available in the market are CRAC, CRAH, chiller units, cooling towers and dry coolers, economizers and evaporative coolers, and other cooling units. Some of the other infrastructure systems include pumps, piping, valves, fire suppression systems, sprinklers, leak detection systems, direct liquid cooling, and liquid immersion cooling. The proliferation telecommunication and cloud service providers and increasing construction activities by colocation providers are factors that will drive the demand in the data center cooling market in Americas. The US is the largest contributor to the data center market followed by Canada and Latin America.

The increasing focus on innovating product portfolio that helps reduce the cost of the systems, improve efficiency, and boost the sustainability of these systems will propel the growth of the data center cooling market in Americas. The rising adoption of CRAC and CRAH units in data center designs will create business opportunities for leading vendors in the market. The data center cooling market in Americas is projected to

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generate revenues of around $2.5 billion in 2023 and grow at a CAGR of more than 6% during the forecast period.

Data Center Cooling Market in Americas - Dynamics

The growing adoption of efficient and innovative technologies leading to the operation of the data center with PUE of less than 1.30 will revolutionize the data center market over the next few years. The adoption of direct liquid cooling and liquid immersion cooling technique will enable operators to achieve a PUE of less than 1.05, transforming the data center cooling market in Americas. Additionally, data center operators will be investing in evaporative or adiabatic coolers that enables them to operate the facility at a PUE of less than 1.2. The trend of adopting these innovative solutions by various enterprise operators and cloud hosting facilities is expected to continue during the forecast period.

Data Center Cooling Market in Americas Segmentation

This market research report includes a detailed segmentation of the market by cooling infrastructure, by cooling technique, by cooling systems, by tier standards, and by geography.

Data Center Cooling Market in Americas – By Cooling Infrastructure

Most of the US, Canada, Chile, and Colombia will be involved in adopting evaporative coolers to leverage benefits from free cooling

The cooling infrastructure segment in the data center cooling market in Americas is classified into the cooling system and other infrastructure. The cooling infrastructure occupied a larger share in the market generating revenues of more than $1 billion in 2017 and is expected to grow at a CAGR more than 5% during the forecast period. The increasing adoption of computer room air conditioner (CRAC), computer room air handler (CRAH), chiller, cooling towers, dry coolers, economizers, evaporative coolers and others will propel the demand for cooling systems in the data center market in the Americas. The purchase of cooling systems with accessories and system level monitoring controls will have a positive impact on the growth of the market over the next few years.

Data Center Cooling Market in Americas – By Cooling Technique

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Direct liquid cooling and immersion cooling to gain traction in the market during the forecast period

The data center cooling market in Americas by cooling technique is segmented into air-based cooling and liquid-based cooling. Air-based cooling is the fastest growing segment in the market growing at a CAGR of more than 8% and expected to generate revenues of over $776 million during the forecast period. The growing popularity of free cooling systems over liquid-based cooling in the market will propel the growth of this market segment. The growing adoption of evaporative coolers that facilitate partial cooling with indoor CRAC units among data centers in few Latin American countries will help boost the demand for air-based cooling systems in data center cooling market in Americas.

Data Center Cooling Market in Americas – By Cooling Systems

CRAC and CRAH systems to occupy the largest market share in the data center cooling market in Americas

The cooling systems in the data center cooling market in Americas is categorized into CRAC & CARH, chiller, cooling towers & dry coolers, and economizers & evaporative coolers. CRAC & CARH occupied the largest market share and is projected to grow at CAGR of 5% during the forecast period. The increasing adoption of chilled water units will augment the growth of this market segment in the data center cooling market. Most of the data centers in the America use CRAC and CRAH units to supply cold air and exhaust hot air from the data hall. However, the inefficiency in supporting high-density environments of DX-based CRAC systems will reduce the demand for these systems in the data center market during the forecast period.

Data Center Cooling Market in Americas – By Tier Standards

The adoption of 2N redundant cooling system in Tier 3 data centers is expected to grow significantly during the forecast period

The tier standards segment in the data center cooling market in Americas is divided into tier 1 and tier 2, tier 3, and tier 4. Tier 3 dominated the market share generating revenues of close to $926 million in 2017 and is expected to grow at a CAGR of more than 7% during the forecast period. Majority of the under-development data center projects in America are under the Tier 3 category. The growing adoption of 2N redundant power infrastructure and N+N in cooling infrastructure will attribute to the

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growth of this market segment during the forecast period. The colocation providers are offering flexibility in offering additional redundancy depending on the requests by the consumers and end-users.

Data Center Cooling Market in Americas – By Geography

North America controls around 85% of investment in the data center market in Americas

The data center cooling market in America by geography is classified into North America and Latin America. North American data center cooling market generated revenues of more than $1 billion in 2017 and is expected to grow at a CAGR of over 5% during the forecast period. The growing market for edge computing across major cities in the US and Canada is attributing to the growth of the market in the North American region. The increasing number of construction activities of both traditional brick and motor facility and modular data centers will create new opportunities for leading vendors in the data center cooling market in Americas. The increasing investment in Canadian data center facilities will transform the cooling systems market in the region during the forecast period.

KEY COUNTRIES PROFILED

The key countries profiled in the report are:

- US
- Canada
- Brazil
- Colombia
- Chile

Key Vendor Analysis

The data center cooling market in Americas consists of both international and regional service providers. The prominent vendors in the market are introducing innovative products that are more than 90% efficiency for data center operations and reduce

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cooling OPEX by up to 50% to sustain the competition in the market. The increasing demand for energy efficient cooling systems that reduces power consumption and carbon emissions will create new business opportunities for vendors in the market. The increasing constructions of large data centers in Latin American countries of Brazil, Chile, and Colombia will encourage players to strengthen their position in the region during the forecast period.

The major vendors in the global market are:

Airedale Air Conditioning

Rittal

Schneider Electric

STULZ

Trane (Ingersoll Rand)

Vertiv

Other prominent vendors include 3M, AIRSYS, Alfa Laval, Allied Control, Asetek, ClimateWorx International, Coolcentric (Wakefield-Vette), CoolIT Systems, Daiking Applied (Daikin Industries), Data Aire, Geist Global, Green Revolution Cooling, KyotoCooling, Motivair Corporation, Munters, Nlyte Software, Nortek Air Solutions, Nortek Humidity (Condair Group), Pentair (Schroff), Qcooling, and Vigilent.

Key market insights include

1. The analysis of the data center cooling market in America provides market size and growth rate for the forecast period 2018-2023.
2. It offers comprehensive insights on current industry trends, trend forecast, and growth drivers about the data center cooling market in America.
3. The report provides the latest analysis of market share, growth drivers, challenges, and investment opportunities.
4. It offers a complete overview of market segments and the regional outlook of data center cooling market in America.
5. The report offers a detailed overview of the vendor landscape, competitive analysis,

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and key market strategies to gain competitive advantage.

REPORT SNAPSHOT

According to the latest industry analysis by Arizton, the global data center cooling market in America size is expected to reach over $2.5 billion by 2023, growing at an impressive CAGR of more than 6% 2017–2023. The market research report provides in-depth market analysis and segmental analysis of the global data center cooling market in America by cooling infrastructure, cooling systems, cooling technique, tier standards, and geography.

Base Year: 2017

Forecast Year: 2018–2023

The study considers the present scenario of the global data center cooling market in Americas and its market dynamics for the period 2017?2023. The study covers a detailed overview of various market growth enablers, restraints, and trends. The study covers both the demand and supply sides of the market. The study also profiles and analyzes the leading five companies and eleven other prominent companies operating in the market.

Major Vendors in the Data Center Cooling Market in Americas

Airedale Air Conditioning

Overview

Product Offerings

Key News

Rittal

Schneider Electric

STULZ

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Trane (Ingersoll Rand)

Vertiv

Prominent Players in the Data Center Cooling Market in Americas

3M

Product Offerings

AIRSYS

Alfa Laval

Allied Control

Asetek

ClimateWorx International

Coolcentric (Wakefield-Vette)

CoolIT Systems

Daiking Applied (Daikin Industries)

Data Aire

Geist Global

Green Revolution Cooling

KyotoCooling

Motivair Corporation

Munters

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Nlyte Software

Nortek Air Solutions

Nortek Humidity (Condair Group)

Pentair (Schroff)

Qcooling

Vigilent

Market Segmentation by Cooling Infrastructure

Cooling Systems

Other Infrastructure

Market Segmentation by Cooling Technique

Air-based Cooling

Liquid-based Cooling

Market Segmentation by Cooling Systems

CRAC & CARH

Chiller

Cooling Towers & Dry Coolers

Economizers

Market Segmentation by Tier Standard

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- Tier 1 and Tier 2
- Tier 3
- Tier 4

Market Segmentation by Geography

- North America
  - US
  - Canada
- Latin America
  - Brazil
  - Colombia
  - Chile
  - Others

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26 OTHER PROMINENT VENDORS

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