

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

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Abstracts

The APAC data center cooling market is anticipated to reach revenues of more than \$2 billion by 2023, growing at CAGR of over 9% during 2017-2023. The market research report also offers market size by cooling systems during the forecast period.

The increasing use of cooling systems with reduced water consumption is creating new revenue opportunities for leading vendors operating in the APAC market. The success of research projects such as tropical climate datacenters and underwater facilities will have an impact on the market over the next few years. The APAC data center cooling market is driven by the growing need for innovative and energy-efficient cooling infrastructure solutions. The increasing focus on the procurement of cooling systems with N+N redundancy, whereas a few datacenters procure 2N systems, especially for precision air conditioners will transform the APAC market. The market research report provides in-depth market analysis and segmental analysis of the APAC data center cooling market by cooling infrastructure, cooling technique, liquid cooling technique, cooling systems, and by geography.

The report considers the present scenario of the APAC data center cooling market and its market dynamics for the period 2018-2023. It covers a detailed overview of various market growth enablers, restraints, and trends. The study covers both the demand and supply sides of the market. It also profiles and analyzes the leading companies and various other prominent companies operating in the market.

Data Center Cooling Market in APAC - Dynamics

The increasing penetration of prefabricated infrastructure and self-build datacenters is propelling the growth of the APAC data center cooling market. The market is witnessing

modular solutions provided by infrastructure vendors such as pre-fabricated facilities, racks, and containment systems in the APAC region. Colocation providers are also leasing spaces from other providers in the market in order to rapidly respond to the customer requirement. The rise of dynamic cooling management across facilities is augmenting the development of the APAC data center cooling market. The increase in rack power density across facilities has necessitated the use of highly efficient cooling systems that consumes less energy and water. Such increase in power density is leading to the need for dynamic cooling management across facilities in the APAC market. The demand for colocation and managed services is growing owing to the technological advancements across industries in the APAC region. The service providers are offering colocation, managed services, interconnection, and cloud connectivity solutions to attract maximum consumers in the APAC data center cooling market. There is a growing demand for colocation spaces among sectors such as BFSI, cloud service providers, media and entertainment, and government agencies.

Data Center Cooling Market in APAC - Segmentation

This market research report includes a detailed segmentation of the market by cooling infrastructure, cooling technique, liquid cooling technique, cooling systems, and by geography. The APAC data center cooling market by cooling infrastructure is classified into the cooling system and other infrastructure. Cooling system segment dominated the majority of market share in 2017, growing at a CAGR of more than 9% during the forecast period. Pump systems, piping units, and valves are the highest revenue generators of the other infrastructure segment in the APAC data center cooling market. The air-based cooling technique is the fastest growing segment in the market, at a CAGR of over 13% during the forecast period. Air-based cooling methods comprises of DX-based CRAC units, free cooling technique solutions, air-cooled chiller-based cooling, and dry coolers.

Liquid-based cooling techniques include chilled-water based cooling, direct liquid cooling, and immersion cooling techniques. Water-based cooling technique occupied more than 2/3rd of the total market share in 2017, growing at a CAGR of approximately 7% during the forecast period. The growing adoption of the adoption of free cooling chillers is propelling the growth of this segment. Various leading vendors are offering liquid immersion cooling and direct liquid cooling as per demand to consumers in the APAC data center cooling market. Economizers and evaporative coolers are the fastest growing segment in the market, at a CAGR of more than 14% during the forecast period. DX-based CRAC units are suitable for smaller facilities that have low rack power density less than 3 kW. The increasing adoption of multiple CRAC and CRAH units split

across data halls, and containment designs are driving the growth of the APAC market.

Market Segmentation by Cooling Infrastructure

- Cooling System

- Other Infrastructure

Market Segmentation by Cooling Technique

- Air-Based Cooling

- Liquid-Based Cooling

Market Segmentation by Liquid Cooling Technique

- Water-Based Cooling Technique

- Direct Liquid & Immersion Cooling Technique

Market Segmentation by Cooling Systems

- CRAC & CRAH

- Chiller

- Cooling Towers & Dry Coolers

- Economizers & Evaporative Coolers

- Other Cooling Units

Data Center Cooling Market in APAC - Geography

The APAC data center cooling market by geography is categorized into China & Hong

Kong, Singapore, Australia, and Rest of APAC. China and Hong Kong dominated more than 1/3rd of the total market share in 2017, growing at a CAGR of over 9% during the forecast period. China and Hong Kong have the largest datacenter operation in the APAC market. The growing investment by internet, cloud, and telecommunication service providers such as Baidu, Alibaba, China Unicom, China Telecom, and China Mobile will boost the revenues across China and Hong Kong region over the next few years. The development of facilities that comprise multiple chillers, cooling towers, and CRAH units in 2N or N+N redundant configuration across Singapore will boost revenues in the APAC data center cooling market.

Market Segmentation by Geography

China & Hong Kong

Singapore

Australia

Rest of APAC

Key Vendor Analysis

The APAC data center cooling market consists of several international and regional players that offer specific products or complete range of infrastructure solutions for facilities. The vendors are providing systems that use both air and water to cool facilities to sustain the intense competition in the APAC market. The top service providers are investing innovations to launch systems that increase the efficiency of facilities operations by 90% and reduce cooling OPEX up to 50% in the market. The establishment of a strong partnership among facility operators and service providers will intensify competition across the APAC data center cooling market.

The major vendors in the APAC market are:

Rittal

Schneider Electric

STULZ

Vertiv

Other prominent vendors include 3M, AIRSYS, Alfa Laval, Allied Control, Asetek, Climaveneta (Mitsubishi Electric), The Condair Group, CoolIT Systems, Daikin Applied, Data Aire, Delta Group, Green Revolution Cooling (GRC), Munters, Nortek Air Solutions, Pentair, Swegon, Trane (Ingersoll Rand), Renovo Zhuhai, United Technologies (Carrier), Vigilent, and Wakefield-Vette.

Key market insights include

1. The analysis of APAC data center cooling market provides market size and growth rate for the forecast period 2018-2023.
2. It offers comprehensive insights into current industry trends, trend forecast, and growth drivers about the APAC data center cooling market.
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 APAC data center cooling market.
5. The report offers a detailed overview of the vendor landscape, competitive analysis, and key market strategies to gain competitive advantage.

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