

Data Center Precision Air Conditioning Market - Global Outlook and Forecast 2020-2025

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Data Center Precision Air Conditioning Market Report

The data center precision air conditioning market by revenue is expected to grow at a CAGR of 2.5% during the period 2020–2025.

The data center precision air conditioning market size to cross USD 1.8 billion by 2025, growing at a CAGR of 2.5% during the forecast period. The global precision air conditioners market is expected to become competitive with the growing adoption of HPC infrastructure for artificial intelligence and machine learning workloads among data centers. Initiatives such as Open Commute Projects are expected to bring several new cooling techniques and technologies to the market, thereby increasing the competition among vendors. Data center operators are searching for vendors providing systems with real-time monitoring and management solutions. This includes analytics to predict cooling equipment failures and maintenance requirements. Data center operators' preference over a single cooling vendor is changing rapidly because of the increased innovations in the market. Several operators are also adopting units from different vendors to provide energy-efficient & cost-effective cooling for the facility. Therefore, the competition is expected to decrease the cost associated with cooling systems in the market.

The following factors are likely to contribute to the growth of the data center precision air conditioning market during the forecast period:

Increasing Development of Facilities with Low PUE

Implementation of Monitoring & Automation Solutions

Deployment of Edge Data Centers

The study considers the present scenario of the data center precision air conditioning market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Data Center Precision Air Conditioning Market Segmentation

This research report covers a detailed segmentation by products, deployment, tier standards, geography. In terms of cooling infrastructure, the North American region has witnessed a strong growth of cooling systems, evaporative coolers, and free cooling chillers in the last few years. The increasing procurement of artificial intelligence-based infrastructure solutions is a major driving factor for the adoption of rack-based and row-based cooling solutions. CRAC and CRAH units will continue to be the largest revenue contributors, followed by evaporative coolers and chillers. The US offers free cooling for over 4,000 hours per year, which helps to reduce the operational cost of data center operators. The UK region has witnessed an increase in free cooling chillers and water-cooled cooling systems. The trend is likely to continue due to high investments from colocation service providers during the forecast period. The facilities in Denmark have an advantage as the region offers 85% free cooling annually. This can reduce electricity consumption by cooling units by up to 50%. The data center market in Denmark is likely to witness the demand for data center construction that is designed to transfer waste heat from the facility to nearby local communities under the district heating concept.

The market is expected to witness the adoption of modular in-rack cooling solutions during the forecast period. In-row cooling technology, which is the most efficient, is used in data centers, which are equipped with a rack power density of over 5 kW per rack and above. As in-row cooling systems prevent the mixing of hot and cold air, they increase efficiency, thereby witnessing high adoption. The deployment of the 5G network is likely to increase the demand for high-performance computing infrastructure procurement as well as the construction of edge data centers. Hence, the installation of modular cooling infrastructure, which mostly include in-row cooling and rack-based cooling systems, is expected to grow during the forecast period.

Most data centers in the US and Canada are Tier III certified and have multiple levels of redundancy. In western Europe, Tier IV facilities adopt a 2N+1 redundant configuration for cooling systems. European countries are the major revenue generators for adiabatic cooling units to cool data centers using outside free air. In the UK, most facilities are either Tier III or Tier IV certified by the Uptime Institute due to high standard design and construction that include redundant configuration. In the Nordic region, colocation service providers are developing Tier III standard facilities adopting N+1 or 2N redundant cooling systems. The majority of data center facilities developed by colocation service providers in Russia from 2019 to June 2020 follow Tier III standards.

By Products

CRAC Units

CRAH Units

By Deployment

In-row cooling

In-rack cooling

By Tier Standards

Tier I & Tier II

Tier III

Tier IV

INSIGHTS BY GEOGRAPHY

The North American data center precision air conditioning market share is expected to reach \$791 million by 2025. The region witnessed the development and expansion of over 150 data center facilities, which include facilities that became operational in 2019 and are expected to be operational by June 2020. The US has witnessed more than

130 facilities that became operational in 2019. It was followed by Canada with more than 15 projects in the same period. The market witnessed more than 130 colocation facilities and more than 15 data center projects from enterprises and government in 2019. North America has always been a strong driver for the data center market, with several recent activities targeting the construction of hyperscale facilities with over 20 MW of power capacity. The region has witnessed increased investments in Tier III facilities, with the US dominating the market.

By Geography

APAC

China & Hong Kong

Australia & New Zealand

India

Japan

Rest of APAC

Western Europe

UK

Germany

France

Netherlands

Ireland

Central Eastern Europe

Russia & Czech Republic

Poland & Austria

Others

North America

US

Canada

Southeast Asia

Singapore

Malaysia

Thailand

Indonesia

Others

Nordic

Denmark

Norway

Sweden

Finland & Iceland

Others

Middle East

GCC

Others

Africa

South Africa

Others

Latin America

Brazil

Others

INSIGHTS BY VENDORS

The global data center precision air conditioning market comprises both global and local providers. There are several cooling infrastructure providers in the market offering specific products or a complete range of infrastructure solutions to data centers. Over the past few years, the growing electricity consumption by data center cooling solutions has led to multiple innovations in the market by vendors. Innovations across infrastructure have led to the development of new products that have increased the efficiency of data center operations by 90% and reduce cooling OPEX up to 50%. The market comprises multiple systems that provide sufficient cooling for the growing rack power density.

Prominent Critical IT Infrastructure Providers

Airedale

Axis Communications

AIRSYS

ClimateWorx

Climaveneta

Data Aire

Delta Group

Emicon

Eaton

Huawei

Nortek Air Solutions

Pentair (Schroff)

Rittal

Renovair Zhuhai

Swegon

Schneider Electric

Vertiv

KEY QUESTIONS ANSWERED

1. What was the market size and growth rate for the data center precision air conditioning market in 2025?
2. What are the key trends impacting the growth of the data center precision air conditioner market?
3. What are the market enablers and threats faced by vendors in the global market?
4. Who are the key vendors in the data center precision air conditioning market? What strategies are vendors adopting to ensure sustainability?
5. Which region is likely to provide significant business opportunities to vendors during the forecast period?

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