

U.S. Data Center Cooling Market - Industry Outlook and Forecast 2021-2026

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this U.S. Data Center Cooling Market Report

The U.S. data center cooling market is expected to grow at a CAGR of over 3% during 2021–2026.

The data center investors are increasingly investing in liquid immersion and direct-to-chip cooling solutions. The importance of edge data centers has been aided by the emergence of 5G network worldwide, and the US is among the earliest adopters of the technology. Many operators in the US such as EdgePresence, EdgeMicro, and American Towers have started investing in these centers. In 2020, Switch partnered with Dell and FedEx to deploy edge data center facilities in the US. DataBank, a colocation service provider, is investing around \$30 million in EdgePresence, an edge data center provider in the US, to collocate their customer workloads to edge centers to reduce latency in their services.

The following factors are likely to contribute to the growth of the U.S. data center cooling market during the forecast period:

5G to Grow Edge Data Center Investments

Introduction of Innovative Data Center Technology

Growth in Hyperscale Data Centers

Growth in Construction Of Cryptocurrency Data Centers

The study considers the present scenario of the U.S data center cooling market and its market dynamics for the period 2020-2026. 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.

U.S. Data Center Cooling Market Segmentation

The U.S. data center cooling market research report includes a detailed segmentation by infrastructure (cooling systems & other infrastructure), systems, technique, tier standards, geography. In terms of cooling, the U.S. data center market by investment is expected to be 15–20% of the total data center investments, depending on the facility design and IT load. The operators are looking for efficient solutions to reduce CAPEX and OPEX, conserve data center space, and reduce the power consumption of cooling units. Most modern facilities are being built based on the ASHRAE data center cooling guidelines and the Uptime Institute's tier standards for redundant design. Metrics such as Power Usage Effectiveness (PUE), Water-usage Effectiveness (WUE), and Carbon Usage Effectiveness (CUE) are likely to play a major factor in the adoption of efficient systems during the forecast period.

Data centers in the South Eastern region adopt free-cooling techniques that include chillers with evaporate cooling. Virginia supports up to 5,500 hours of passive free cooling annually, thereby reducing the application of chillers. Alabama and Florida support over 3,500 hours and 3,000 hours, respectively. The data center investment for several solutions across in South Eastern US will include chillers that support free cooling or chillers, cooling towers, and CRAH units.

Air-based techniques, which include traditional CRACs and free cooler solutions, are gaining momentum over legacy liquid-based solutions. However, the use of chilled water systems is highly prevalent in the U.S. data center cooling market. The operators are mainly using the hybrid system with minimal compressor support during peak summers and free cooler solutions without the need for compressors.

Western US leads in the development of Tier IV data centers, followed by South-Eastern US and South

Western US. The majority of data centers in South Eastern US are developed according

to Tier III and Tier IV standards, with a minimum cooling redundancy of N+1. However, in Southern Western US several facilities are designed to be Tier III and Tier IV standards, with the cooling redundancy ranging from N+1 to 2N. Over 90 data center projects that are operational or are under construction, fall under Tier III standards. Western and the South-Eastern US lead the region in terms of Tier III projects. The majority of new facilities are designed to be Tier III standards with N+N redundancy. However, they can be reconfigured up to 2N+1 redundancy, with the incorporation of flexible designs. This trend is likely to continue throughout the forecast period, with many operators expected to move to the Tier IV category based on the growth in rack power density and the increasing usage of critical data center applications. In 2020, over 30 facilities in the US were developed according to Tier IV standards.

INSIGHTS BY GEOGRAPHY

Georgia, and Florida have emerged as the preferred investment destinations in the South Eastern US due to the availability of strong network connectivity and the presence of renewable sources along with tax incentives. In 2020, around 35 new projects were open or under development in the South Eastern US. Virginia is among the largest and leading data center markets in the US. The region attracts significant investment from enterprise and cloud service providers in 2020. The increased construction and expansion of data centers, especially hyperscale facilities, will offer significant opportunities for cooling infrastructure providers.

By Geography

US

South Eastern US

South Western US

Mid Western US

North Western US

Western US

INSIGHTS BY VENDORS

Airedale International Air Conditioning, Rittal Systems, Schneider Electric, STULZ, and Vertiv Group are the key players holding major U.S. data center cooling market share. The U.S. data center cooling market comprises air- and liquid-based systems service providers that provide sufficient cooling solutions. The market will witness high competition due to the increased demand for energy-efficient systems with low carbon emissions. Free cooling system providers offering evaporative coolers and dry coolers along with chillers and CRAC/CRAH units are likely to face competition in regions that support free cooling for more than 5,000 hours. With the increasing deployment of edge facilities, modular, rack-based, and in-row cooling system providers are likely to face strong competition for offering efficient systems to support edge and micro-edge data center cooling.

Prominent Data Center Cooling Infrastructure Providers

Airedale International Air Conditioning

Rittal Systems

Schneider Electric

STULZ

Vertiv Group

Other Prominent Data Center Infrastructure Providers

3M

Airsys Cooling Technologies

American Cooling Tower

Asetek

Aquila Group

Aspen Systems

BasX Solutions

Carrier

Chilldyne

Climaveneta (Mitsubishi Electric Group)

Condair Group

Cooler Master

CoolIT Systems

Daikin Applied (Daikin Industries)

Data Aire (Construction Specialties)

Degree Controls

Delta Group

ebm-papst Group

EVAPCO

General Air Products

Green Revolution Cooling (GRC)

Johnson Controls

KyotoCooling

Lennox International

LiquidCool Solutions

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Motivair

Munters

Nortek Air Solutions

nVent

OptiCool Technologies

SPX Cooling

Stellar Energy

Swegon Group

Systecon

Trane (Ingersoll Rand)

United Metal Products (UMP)

Upsite Technologies

Vigilent

Wakefield-Vette

KEY QUESTIONS ANSWERED

1. What is the impact of COVID-19 on the data center cooling market?
2. What are major and innovative trends witnessed in the data center infrastructure?
3. What are the market restraints impacting the revenues of the data center market growth?

4. What is the U.S. data center cooling market size and growth rate during the period 2021-2026?
5. Who are the key players in the data center cooling market?
6. Which segments are likely to generate the highest revenues for vendors during the forecast period?

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