

Asia-Pacific Data Center Cooling Market: Focus on Product, Application, and Country-Level Analysis - Analysis and Forecast, 2025-2035

<https://marketpublishers.com/r/A409E1063646EN.html>

Date: July 2025

Pages: 118

Price: US\$ 3,250.00 (Single User License)

ID: A409E1063646EN

Abstracts

This report can be delivered in 2 working days.

Introduction to Asia-Pacific Data Center Cooling Market

The Asia-Pacific data center cooling market is projected to reach \$41.10 billion by 2035 from \$9.46 billion in 2024, growing at a CAGR of 13.61% during the forecast period 2025-2035. Advanced data centre cooling solutions are becoming more and more necessary as APAC's digital infrastructure, cloud use, and data generation all rise. Effective cooling solutions are essential to maintaining equipment longevity and uptime as workloads related to AI and high-performance computing increase. Sustainable, low-impact cooling technologies are becoming more popular as a result of regional governments enforcing stronger energy efficiency requirements, water usage caps, and refrigerant regulations. To meet national sustainability goals, nations like Singapore, Australia, and India are pushing for closed-loop systems, free cooling, and low-GWP refrigerants. Although innovation is speeding up the adoption of AI-driven airflow control, liquid cooling, and immersion systems, obstacles including high upfront costs and integration difficulties continue to be major obstacles. However, the drive for more eco-friendly and effective digital infrastructure is changing cooling tactics in data centres around Asia.

Market Introduction

The market for data centre cooling in Asia Pacific is expanding quickly due to the region's increased use of cloud computing, AI, and digital transformation. Effective and sustainable cooling solutions are now essential to maintaining uptime, performance, and

regulatory compliance as data centre density rises and rack power levels climb from 10 kW to over 30 kW. In order to better handle increasing heat loads, operators are aggressively moving away from conventional CRAC/CRAH units and towards cutting-edge technologies like immersion cooling, rear-door heat exchangers, and direct-to-chip liquid cooling.

Data centre operators are being pushed to implement low-impact, closed-loop, and hybrid cooling systems by nations like Singapore, Australia, India, and Japan that are imposing tougher energy efficiency standards, water usage laws, and low-GWP refrigerant mandates. In order to increase energy efficiency and reduce PUE (Power Usage Effectiveness), AI-powered thermal management, modular cooling designs, and the usage of free cooling in appropriate regions are increasingly becoming more popular.

With the help of government incentives and sustainability standards, the market is still growing despite obstacles including high initial investment, complicated retrofits, and water scarcity in some areas. The APAC data centre cooling market is expected to grow quickly as environmental restrictions tighten and demand for high-performance computing increases, eventually becoming a vital component of green, future-ready digital infrastructure.

Market Segmentation

Segmentation 1: by End-Use Industry

IT and Telecom

Healthcare

Retail

Banking, Financial Services, and Insurance

Government and Public Sector

Manufacturing

Others

Segmentation 2: by Data Center Type

Centralized Data Center

Hyperscale

Colocation

Enterprise

Edge Data Center

Segmentation 3: by Application Area

Artificial Intelligence (AI)

High-Performance Computing (HPC)

Cloud Computing

Edge Computing

Others

Segmentation 4: by Solution

Air Cooling

Air Conditioner

Air Handling Unit

Chiller

Cooling Tower

Economizer System

Others

Liquid Cooling

Direct

Rear Door Heat Exchangers (RDHX)

Free Cooling

Segmentation 5: by Rack Density

Low Rack Density (1-4 kW)

Medium Rack Density (5-9 kW)

High Rack Density (Above 9 kW)

Segmentation 6: by Region

Asia-Pacific

Market trends, Drivers and Challenges of APAC Data Center Cooling Market

Market Trends

Rapid adoption of liquid cooling solutions (direct-to-chip, rear-door heat exchangers) to manage rising rack power densities.

Growth in immersion cooling pilots, especially for high-performance computing and AI workloads.

Expansion of modular, prefabricated cooling units to accelerate deployment and scalability at edge sites.

Integration of AI/ML-driven monitoring and dynamic airflow management for predictive maintenance and efficiency gains.

Increasing use of free-cooling (air-side and water-side economizers) in temperate APAC climates to reduce chiller runtime.

Circular-economy initiatives: waste-heat recovery for district heating or facility reuse in mature markets.

Market Drivers

Escalating IT load per rack (from 10 kW to 30 kW+), necessitating more efficient thermal solutions.

Corporate net-zero and ESG targets prompting facility owners to minimize PUE and carbon footprints.

Stringent regional regulations on water use and refrigerant emissions, driving adoption of low-GWP coolants and closed-loop systems.

Demand for rapid deployment of hyperscale and edge data centers across Southeast Asia, India and Australia.

Rising electricity costs incentivizing operators to invest in energy-efficient chillers and airflow optimization.

Market Challenges

High initial CAPEX for advanced cooling technologies (liquid cooling, immersion systems) versus traditional CRAC units.

Water scarcity in certain APAC regions complicates adoption of water-cooled chillers and economizers.

Complex integration requirements when retrofitting legacy facilities with new cooling architectures.

Skills and talent shortages for design, installation and maintenance of specialized cooling systems.

Fragmented regulatory landscape across APAC, with varying standards for refrigerant handling, water discharge and energy efficiency.

Supply chain constraints for critical components (heat exchangers, pumps, specialty coolants) amid global procurement pressures.

How can this report add value to an organization?

Product/Innovation Strategy: This report provides a comprehensive product/innovation strategy for the APAC data center cooling market, identifying opportunities for market entry, technology adoption, and sustainable growth. It offers actionable insights, helping organizations to meet environmental standards, gain a competitive edge, and capitalize on the increasing demand for eco-friendly solutions in various industries.

Growth/Marketing Strategy: This report offers a comprehensive growth and marketing strategy designed specifically for the APAC data center cooling market. It presents a targeted approach to identifying specialized market segments, establishing a competitive advantage, and implementing creative marketing initiatives aimed at optimizing market share and financial performance. By harnessing these strategic recommendations, organizations can elevate their market presence, seize emerging prospects, and efficiently propel revenue expansion.

Competitive Strategy: This report crafts a strong competitive strategy tailored to the APAC data center cooling market. It evaluates market rivals, suggests methods to stand out, and offers guidance for maintaining a competitive edge. By adhering to these strategic directives, companies can position themselves effectively in the face of market competition, ensuring sustained prosperity and profitability.

Key Market Players and Competition Synopsis

The companies that are profiled in the Asia-Pacific data center cooling market have been selected based on input gathered from primary experts and analyzing company coverage, product portfolio, and market penetration.

Some of the prominent names in this market are:

PEZY Computing K.K.

Fujitsu

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