

Data Center Liquid Cooling Market - A Global and Regional Analysis: Focus on Product, Application, and Country Analysis - Analysis and Forecast, 2022-2027

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Abstracts

Global Data Center Liquid Cooling Market Industry Overview

The global data center liquid cooling market was valued at \$2.79 billion in 2021, which is expected to grow with a CAGR of 27.67% and reach \$11.84 billion by 2027. The growth in the global data center liquid cooling market is expected to be driven by increased water scarcity and boosting number of edge, colocation, and hyper data centers.

Market Lifecycle Stage

The data center liquid cooling market is in a growth phase. Cooling is a standard part of data center operations as servers and networking devices constantly run 24/7, which increases the core temperature, which if not controlled, can lead to a data center outage. Reducing water scarcity, climate actions, sustainable urban infrastructure, and recycling and reusability are some of the United Nations Sustainable Development Goals (SDGs) that are expected to drive innovations and improvements toward the adoption of liquid cooling technologies. Therefore, a growing number of data centers is resulting in a boost in the utilization of data center liquid cooling techniques.

Impact

Data center liquid cooling highly impacts thermal management techniques with the use of dielectric coolants, which can be potentially used on high-density data centers. This

dielectric liquid permits deploying CPU and GPU clusters much closer collectively, i.e., in high-density configurations, while protecting crucial elements from thermal and environmental risks.

Data center liquid cooling bridges the gap between traditional and future data centers. It not only improves the data infrastructure system efficiency but also cuts by a huge margin the amount of energy consumed. This leads to reduced energy bills and carbon footprint.

Impact of COVID-19

Due to the COVID-19 pandemic, the revenues went down slightly in 2020 and resumed an uptrend gradually in 2021. Therefore, data center liquid cooling companies have adopted strategies to come back positively from this crisis, and therefore, the global data center liquid cooling market is anticipated to bounce back more robustly in the future. This is due to an increase in data usage by 34% from the pre-pandemic times.

Market Segmentation:

Segmentation 1: by End-Use Industry

IT and Telecom

Banking, Financial Services, and Insurance (BFSI)

Government and Public Sector

Manufacturing

Healthcare

Retail

Others

The IT and telecom segment is the dominating application segment. With the introduction of new technologies such as 5G, IoT, virtual and augmented reality, and artificial intelligence, the telecommunications industry is evolving to cater to huge data

processing. As a result, telecom data centers are also transforming to handle high data volume and low latency needs. The banking, financial services, and insurance (BFSI) segment is expected to anticipate the highest growth rate due to being digitized, which involves utilizing the most cutting-edge technology, which will boost the data center usage, thereby augmenting the data center cooling solutions.

Segmentation 2: by Data Center

Hyperscale

Colocation

Enterprise

Others

Segmentation 3: by Solution

Indirect Cooling

Direct Cooling

Based on liquid cooling, the indirect segment is expected to dominate the global data center cooling market since it is a highly efficient way to minimize energy usage while maximizing chilling capabilities. Moreover, the direct segment witnesses a higher growth rate due to emerging cooling solutions such as direct-to-chip and immersion.

Segmentation 4: by Region

North America - U.S., Canada, and Mexico

Europe - Germany, France, Spain, Italy, Switzerland, Netherlands, and Rest-of-Europe

China

U.K.

Asia-Pacific - South Korea, India, Japan, Australia, Singapore, and Rest-of-Asia-Pacific

Rest-of-the-World - Middle East and Africa and South America

North America dominated the data center liquid cooling market in 2021 and is anticipated to uphold its dominance throughout the forecast period.

Recent Developments in Global Data Center Liquid Cooling Market

In January 2022, Green Revolution Cooling collaborated with Intel to reduce the environmental impact of digital infrastructure. This would result in the customers developing and implementing advanced data center liquid cooling techniques in future data centers.

In March 2021, Submer and SYNEX Corporation joined forces. According to the agreement, Submer's range of liquid cooling and edge-ready solutions will be manufactured in the U.S. and distributed by SYNEX.

In November 2021, Schneider Electric and Chilldyne formed an alliance partnership to increase the sustainability and effectiveness of data centers. This collaboration enhances the entire line of Uniflair cooling and chiller solutions offered by Schneider Electric.

In March 2021, LiquidStack, launched from stealth mode with new deployments across vital sectors such as high-performance computing (HPC), cloud services, artificial intelligence (AI), and edge and telecommunications, and funded by Strategic Partner Wiwynn in a Series A funding round.

Demand – Drivers and Limitations

Following are the demand drivers for the data center liquid cooling market:

Increasing Data Center Spending

Thermal Energy Recovery and Conversion from Data Centers

Increasing Need for Sustainable Cooling Solutions

The market is expected to face some limitations due to the following challenges:

High Investment Costs

Alternative Technologies Existing in the Market

How can this report add value to an organization?

Product/Innovation Strategy: The study provides the reader with a detailed understanding of the different data center liquid cooling-based products by application (end-use industry and data center type) that generates higher revenues when compared to conventional data center cooling practices. Therefore, the data center liquid cooling business is a moderate investment and high revenue generating model.

Growth/Marketing Strategy: The global data center liquid cooling market has seen major development by key players operating in the market, such as business expansion, partnership, collaboration, and joint venture. The favored strategy for the companies has been partnerships, collaborations, mergers, acquisitions, and joint ventures to strengthen their positions in the data center liquid cooling market. For instance, in August 2021, Lubrizol and Submer partnered to offer holistic, tailored data center liquid cooling solutions for the expanding data center infrastructure market.

Competitive Strategy: Key players in the global data center liquid cooling market analyzed and profiled in the study involve data center liquid cooling-based product manufacturers that provide tools and technologies. Moreover, a detailed competitive benchmarking of the players operating in the global data center liquid cooling market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on inputs gathered from

primary experts and analyzing the company's coverage, product portfolio, and market penetration.

Key Companies Profiled

ALFA LAVAL

Asetek, Inc

Asperitas

Black Box

Boyd

Chillydyne

COOLIT SYSTEMS

DCX The Liquid Cooling Company

ExaScaler Inc

FUJITSU

Green Revolution Cooling, Inc

Iceotope Technologies Limited

LiquidStack and Allied Control

Motivair Corporation

Nortek Air Solutions, LLC

Rittal GmbH & Co. KG

Schneider Electric

Submer

Wiwynn

ZutaCore

JETCOOL Technologies Inc

CoollestDC

TMGcore, Inc.

FLUIX Inc

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