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

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Abstracts

This report can be delivered in 2 working days.

Introduction to Europe Data Center Cooling Market

The Europe data center cooling market is projected to reach $20.55 billion by 2035 from $6.76 billion in 2024, growing at a CAGR of 10.18% during the forecast period 2025-2035. The rise in data generation, cloud computing, and the expansion of digital infrastructure are driving the data centre cooling industry in Europe. Efficient cooling systems are becoming essential for preserving equipment reliability and uptime as the need for high-performance computing rises. Strict EU rules and sustainability goals have impacted the market, leading to a move towards low-energy, eco-friendly cooling technology. The region's adoption of sophisticated, energy-efficient cooling solutions is accelerating due to ongoing innovation and mounting pressure to cut energy usage, even while obstacles like high initial investment and system complexity still exist.

Market Introduction

The market for data centre cooling in Europe is changing quickly because to the exponential rise in workloads related to artificial intelligence, cloud computing, and data production. Effective thermal management has become essential for maintaining hardware longevity, operational continuity, and regulatory compliance as data centres grow in size and complexity. Energy-efficient solutions are a strategic focus for operators throughout the region because cooling systems can contribute up to 40% of a data center's overall energy consumption.

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The adoption of cutting-edge cooling technologies is mostly being driven by European nations, especially Germany, the Netherlands, Ireland, and the Nordics.

These include direct-to-chip systems, liquid cooling, and free air cooling, which are made to manage high-density computing with little effect on the environment. Low-carbon, water-efficient, and environmentally friendly cooling techniques are becoming more popular in the region as a result of the push for sustainability brought about by EU climate rules, the Renewable Energy Directive, and the European Green Deal.

Europe's diverse climates have an impact on cooling tactics as well. While southern nations need more durable solutions to sustain efficiency in hot conditions, northern locations benefit from ambient cold air to lessen reliance on mechanical systems. The European data centre cooling market is expected to continue to innovate and grow as regulatory pressure increases and digital infrastructure keeps growing.

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

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- 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

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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 Country

Germany

France

U.K.

Italy

Netherlands

Spain

Rest-of-Europe

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

Market Trends

Shift toward liquid and immersion cooling to manage high-density AI and HPC workloads

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Rising focus on energy-efficient and sustainable cooling systems to meet ESG and carbon neutrality goals

Adoption of free cooling and economizers in colder regions like Scandinavia to reduce energy consumption

Growing use of AI and automation for real-time thermal management and predictive maintenance

Integration of modular and prefabricated cooling solutions for faster deployment and scalability

Increase in green data centers powered by renewable energy and eco-friendly cooling technologies

Market Drivers

Surge in data traffic and cloud computing demand driving data center expansion across Europe

Stringent EU regulations on energy efficiency (e.g., EN50600, EU Taxonomy) pushing operators to adopt greener solutions

Government incentives and sustainability mandates supporting low-carbon infrastructure development

Need to reduce operational costs, particularly energy expenses tied to cooling (up to 40% of total energy use)

Rise in edge data centers and colocation facilities, requiring compact and efficient cooling systems

Market Challenges

High upfront costs for advanced cooling technologies like liquid immersion and adiabatic systems

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Regulatory complexity and variations across European countries creating compliance difficulties

Water usage concerns, especially in drought-prone regions, limiting the viability of water-based cooling

Legacy infrastructure limitations slowing the transition to next-gen cooling methods

Skilled labor shortage in cooling system design, integration, and maintenance across the region

How can this report add value to an organization?

Product/Innovation Strategy: This report provides a comprehensive product/innovation strategy for the Europe 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 Europe 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 Europe 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 Europe data center cooling market have been

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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:

Schneider Electric

Asetek, Inc.

Submer

Munters

ALFA LAVAL

Condair Group

Danfoss

Johnson Controls International plc

STLUZ GMBH

DCX Liquid Cooling Systems

Rittal GmbH & Co. KG

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Contents

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2 REGIONS

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3 COMPETITIVE BENCHMARKING & COMPANY PROFILES

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List Of Figures

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List Of Tables

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