# Global Data Center Cooling Market Size Study & Forecast, by Product (Air Conditioners, Precision Air Conditioners, Liquid Cooling, Air Handling Unit, and Others), By Data Center Type (Large Scale, Medium Scale, and Small Scale), By Cooling Technique (Room-based Cooling, Rack-based Cooling, and Row-based Cooling), By Industry (BFSI, IT and Telecom, Manufacturing, Retail, Healthcare, Energy and Utilities, and Others), and Regional Analysis, 2023-2030

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## Abstracts

Global Data Center Cooling Market is valued at approximately USD 13.51 billion in 2022 and is anticipated to grow with a healthy growth rate of more than 10.7% over the forecast period 2023-2030. Data centers play a pivotal role for organizations, offering centralized storage, networking, and backup capabilities. The surge in the demand for higher computing capacity is fueled by the exponential growth of data generation, resulting in increased energy consumption within data centers. This heightened energy usage has raised both financial and environmental concerns, prompting a push for optimized data center cooling strategies. Data center cooling encompasses the monitoring, measurement, and regulation of resources and energy consumption in IT equipment such as servers, network switches, and storage units, including infrastructure components such as computer room air conditioners and power distribution units (PDUs). Data center operators are required to deploy and manage their IT hardware infrastructures to meet the escalating demands for data storage and services such as backup, archiving, and authentication management, which is expected to drive growth in

the data center cooling market. Also, factors such as growing investment in the IT & telecom sector, rising emphasis on the redundancy and reliability, increasing volume of digital data, coupled with emergence of green data centers are the most prominent factors that are propelling the market demand across the globe. Also, scalable and localized cooling solutions are needed to support edge data centers and guarantee optimal performance in dispersed computing settings as a result of the growing number of edge computing installations, which move data processing closer to the source of data production. According to Statista, in 2020, the sector size of Edge computing accounted for USD 153 billion globally, which is anticipated to rise to USD 317 billion by 2026. Consequentially, the rapid proliferation of edge computing is bolstering the market growth.

In addition, the surge in hyperscale data centers is further exhibiting a positive influence on the market growth at a substantial rate. Hyperscale data centers are massive facilities housing vast computing resources for large cloud service providers. As per Statista, in 2021, the number of hyperscale data centers globally reached 700, which is an increase from 597 hyperscale data centers in 2020. These facilities require equally impressive cooling solutions to handle the immense heat generated by their packed servers. Moreover, the rise in the demand for energy-efficient and cost-effective data centers, as well as the surge in deployment of high-performance computing (HPC) systems presents various lucrative opportunities over the forecasting years. However, the adaptability requirements and power outages, along with the high investment costs associated with the design and maintenance of these solutions are hindering the market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Data Center Cooling Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022 with largest market share owing to the presence of tech giants such as Facebook, Amazon Inc., and Google Inc. The region boasts a significant concentration of data centers due to the presence of numerous IT companies, creating opportunities for growth in the data center cooling solutions industry. This trend is further fueled by substantial spending and investment in data centers. For instance, in May 2022, Intel launched a new Data Center Sustainability Initiative, investing USD 700 million to establish a dedicated research center for liquid and immersion cooling. Additionally, Intel introduced the first reference design for immersion cooling technology, aiming to promote its utilization in data centers. Thereby, these developments are expected to fuel market growth in North America. Whereas, Asia Pacific is expected to grow at the highest CAGR over the forecast years. The rising number of providers offering external IT infrastructure services, responsible for

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managing crucial business data and applications are significantly propelling the market demand. Also, the Asia Pacific region is witnessing a rapid expansion in data center infrastructure, primarily driven by substantial investments in digital transformation, widespread adoption of cloud computing, and AI-driven applications by businesses and governments. This surge in advanced computing systems has led to an increased demand for efficient cooling solutions capable of managing the generated heat. Data center cooling, with its capacity for adequate heat dissipation and energy efficiency, is positioned to cater to the evolving requirements of data centers in the Asia Pacific region.

Major market players included in this report are:

Asetek, Inc. (U.S.)

Rittal GmbH & Co. KG (Germany)

Schneider Electric (France)

Coolcentric TM(U.S.)

Vertiv Group Corp. (U.S.)

STULZ GMBH (Germany)

Hitachi, Ltd. (Japan)

Nortek Holdings Inc (Italy)

LiquidStack Holding B.V. (U.S.)

Munters Corporation (Sweden)

Recent Developments in the Market:

- In March 2023, Castrol declared that the company has partnered with GRC's ElectroSafe Fluid Partner Program, aimed at reducing water and energy usage in data centers. Castrol contributes to GRC's leadership in data center immersion cooling solutions by providing cutting-edge immersion cooling fluids.

In May 2022 - Alibaba Cloud, a leading Chinese digital technology company, inaugurated its third data center in Germany, offering a comprehensive suite of cloud services including storage, networking, and databases. The data center incorporates a highly efficient air conditioning system that leverages dry coolers using ambient temperatures, providing over 6,500 hours of free cooling annually and minimizing reliance on mechanical refrigeration.

In May 2023, Fujitsu and Microsoft unveiled a worldwide collaboration focused on facilitating 'sustainability transformation' and assisting enterprises in migrating their workloads to cloud environments. This partnership offers businesses a holistic solution for updating and optimizing their IT infrastructure leveraging Fujitsu's proficiency in data center infrastructure alongside Microsoft's Azure cloud computing platform.

Global Data Center Cooling Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered - Product, Data Centre Type, Cooling Technique, Industry, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analyst’s working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values to the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters detailed information about the crucial aspects such as driving factors & challenges which will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along with the detailed analysis of competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Product:

Air Conditioners

Precision Air Conditioners

Liquid Cooling

Air Handling Unit

Others

By Data Center Type:

Large Scale

Medium Scale

Small Scale

By Cooling Technique:

Room-based Cooling

Rack-based Cooling

Row-based Cooling

By Industry:

BFSI

IT and Telecom

Manufacturing

Retail

Healthcare

Energy and Utilities

Others

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

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Saudi Arabia

South Africa

Rest of Middle East & Africa

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