

Global Data Center Centrifugal Chiller Market Research Report 2026(Status and Outlook)

<https://marketpublishers.com/r/GF9FB25731D5EN.html>

Date: March 2026

Pages: 161

Price: US\$ 3,200.00 (Single User License)

ID: GF9FB25731D5EN

Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Data Center Centrifugal Chiller competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. A Data Center Centrifugal Chiller is a large-capacity cooling system specifically designed to provide reliable and efficient chilled water for temperature and humidity control in data centers, where servers and networking equipment generate significant amounts of heat. It is a centrifugal compressor-based chiller that uses the principle of centrifugal force to compress refrigerant vapor, enabling large-scale heat removal. The chilled water produced circulates through air handling units (AHUs) or computer room air handlers (CRAHs) to absorb heat from IT equipment, maintaining stable operating conditions. In 2024, global Data Center Centrifugal Chiller sales volume reached approximately 9,500 units, with an average global market price of around US\$80,000 per unit. The market potential for Data Center Centrifugal Chillers is substantial, driven by the exponential growth of global data traffic, cloud computing, artificial intelligence, and edge infrastructure, as these large-capacity cooling systems are indispensable for maintaining optimal thermal environments in hyperscale, colocation, and enterprise data centers; demand is expected to expand significantly due to the surge in hyperscale facilities across North America, Europe, and Asia-Pacific, where operators increasingly seek highly efficient, low-maintenance, and sustainable cooling solutions capable of reducing total cost of ownership while ensuring maximum uptime, with centrifugal chillers equipped with technologies such as variable speed drives, magnetic bearings, low-GWP refrigerants, and advanced control systems emerging as a preferred option for their ability to deliver high part-load efficiency, scalability, and reliability in mission-critical environments; in addition, government energy-efficiency regulations and sustainability commitments from major

data center operators (such as Amazon, Google, Microsoft, and Meta) are accelerating adoption of energy-efficient centrifugal chillers, particularly in regions with high electricity costs or carbon reduction targets, while rapid data center expansion in emerging markets like India, Southeast Asia, and the Middle East further adds momentum, creating strong opportunities for manufacturers who can provide customized, modular, and digital-ready chiller systems that integrate with advanced building management and predictive maintenance platforms; consequently, the global market outlook indicates strong growth over the next decade, with centrifugal chillers positioned not only as a backbone of reliable data center cooling but also as a critical enabler for sustainable digital infrastructure.

The global Data Center Centrifugal Chiller market size was estimated at USD 759.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 10.30% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Data Center Centrifugal Chiller market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Data Center Centrifugal Chiller market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Data Center Centrifugal Chiller market.

Global Data Center Centrifugal Chiller Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

Smardt Chiller Group
Johnson Controls
Carrier Corporation
Vertiv
Thermal Care, Inc.
HITEMA INTERNATIONAL
Submer
Asperitas
Usystems
Munters
LiquidStack
STULZ
Modine Manufacturing Company
Gree
Dunham Bush
Climaveneta
Nanjing Canatal

Market Segmentation (by Type)

Air-Cooled Centrifugal Chiller
Water-Cooled Centrifugal Chiller
Magnetic Levitation Centrifugal Chiller

Market Segmentation (by Application)

Internet Data Center
Enterprise Data Center
National Supercomputing Center

Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study
Neutral perspective on the market performance
Recent industry trends and developments
Competitive landscape & strategies of key players
Potential & niche segments and regions exhibiting promising growth covered
Historical, current, and projected market size, in terms of value
In-depth analysis of the Data Center Centrifugal Chiller Market
Overview of the regional outlook of the Data Center Centrifugal Chiller Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division

standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Data Center Centrifugal Chiller Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Data Center Centrifugal Chiller, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

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