

# Global ICT Data Center Air Conditioning Market Research Report 2026(Status and Outlook)

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## 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 ICT Data Center Air Conditioning competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. ICT data center air conditioning refers to high-precision, high-reliability cooling systems specifically designed for information and communication technology (ICT) environments. These systems ensure stable temperature and humidity to support the continuous, efficient operation of servers, network equipment, and storage systems. Compared with conventional comfort cooling, ICT cooling systems offer 24/7 operation, precise temperature and humidity control, high energy efficiency (COP), and intelligent monitoring, making them ideal for IDCs, edge computing nodes, and core telecom facilities. The air conditioning systems in ICT data centers are mission-critical infrastructure, ensuring thermal stability and uptime of IT loads in increasingly high-density environments. With rising demand for data processing, artificial intelligence, and edge computing, precision cooling solutions are evolving beyond traditional HVAC to achieve lower PUE (Power Usage Effectiveness), higher reliability, and better environmental performance. Based on cooling method, the market segments into water-cooled systems, air-cooled systems, and others, each with distinct use cases, investment profiles, and operational complexities. Water-cooled air conditioning systems, centered around chillers, cooling towers, and chilled water loops feeding CRAH (Computer Room Air Handler) units, are the gold standard for hyperscale and high-density data centers. These systems offer superior energy efficiency and long-term scalability, supporting sustainable operations aligned with carbon neutrality goals. However, they involve high capital expenditure, extended deployment timelines, and intricate maintenance. Water availability and water treatment requirements also constrain site selection, making these solutions best suited to large, stable deployments

with expert facility management teams. Air-cooled systems, including DX (Direct Expansion) and CRAC (Computer Room Air Conditioning) units with air-cooled condensers, are widely adopted in small to mid-sized data centers and edge facilities. With lower upfront costs and simpler installation, they support rapid deployment and flexible scaling. Enhanced with inverter compressors, EC fans, and adaptive controls, air-cooled systems now reach significantly better efficiency, although they remain limited when managing high rack densities or large-scale thermal loads. Alternative cooling technologies such as indirect evaporative cooling (IEC), immersion liquid cooling, cold plate cooling, and thermosiphon-based systems are gaining traction as next-generation solutions. Especially suitable for AI clusters and GPU-dense environments, these options offer ultra-low PUE and reduced footprint. However, adoption is still nascent due to standardization gaps, immature supply chains, and limited long-term performance data. From a regional perspective, Asia-Pacific markets (China, India, Southeast Asia) are seeing rapid demand growth, driven by digital infrastructure rollouts and policy incentives. While air-cooled systems dominate general enterprise and edge deployments, Tier-1 hyperscalers prefer water-cooled solutions for enhanced energy optimization. In North America and Europe, alternative cooling approaches, including liquid cooling and AI-based building management systems (BMS), are being aggressively piloted and deployed. In summary, ICT data center cooling is shifting from standalone hardware procurement to integrated, intelligent, and energy-aware system design. Future competitiveness will hinge on innovations in cooling architecture, sustainability compliance, AI-based monitoring, and modularity. For investors and solution providers, understanding the total lifecycle cost, regional climate adaptability, and load redundancy strategies of each cooling approach is key for informed decision-making and successful long-term deployment.

The global ICT Data Center Air Conditioning market size was estimated at USD 2348.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 7.60% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global ICT Data Center Air Conditioning 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 ICT Data Center Air Conditioning 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 ICT Data Center Air Conditioning market.

### **Global ICT Data Center Air Conditioning 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**

Vertiv

Stulz

Daikin

Mitsubishi Electric

Schneider Electric

Envicool

Yimikang Tech

Gree

Midea

Canatal

Eaton  
Shenling Environmental Systems  
Euroklimat  
Haier  
Hisense  
Airsys  
iTeaQ  
Blackshields Environment  
Jirong Air-conditioning

### **Market Segmentation (by Type)**

Water-Cooled Air Conditioner  
Air-Cooled Air Conditioner  
Others

### **Market Segmentation (by Application)**

IT Companies  
Banks, Finance and Insurance Companies  
Educational Institutions  
Government Departments  
Others

### **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 ICT Data Center Air Conditioning Market  
Overview of the regional outlook of the ICT Data Center Air Conditioning 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 ICT Data Center Air Conditioning 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 ICT Data Center Air Conditioning, 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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## Contents

### **1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE**

- 1.1 Market Definition and Statistical Scope of ICT Data Center Air Conditioning
- 1.2 Key Market Segments
  - 1.2.1 ICT Data Center Air Conditioning Segment by Type
  - 1.2.2 ICT Data Center Air Conditioning Segment by Application
- 1.3 Methodology & Sources of Information
  - 1.3.1 Research Methodology
  - 1.3.2 Research Process
  - 1.3.3 Market Breakdown and Data Triangulation
  - 1.3.4 Base Year
  - 1.3.5 Report Assumptions & Caveats

### **2 ICT DATA CENTER AIR CONDITIONING MARKET OVERVIEW**

- 2.1 Global Market Overview
  - 2.1.1 Global ICT Data Center Air Conditioning Market Size (M USD) Estimates and Forecasts (2020-2035)
  - 2.1.2 Global ICT Data Center Air Conditioning Sales Estimates and Forecasts (2020-2035)
- 2.2 Market Segment Executive Summary
- 2.3 Global Market Size by Region

### **3 ICT DATA CENTER AIR CONDITIONING MARKET COMPETITIVE LANDSCAPE**

- 3.1 Company Assessment Quadrant
- 3.2 Global ICT Data Center Air Conditioning Product Life Cycle
- 3.3 Global ICT Data Center Air Conditioning Sales by Manufacturers (2020-2025)
- 3.4 Global ICT Data Center Air Conditioning Revenue Market Share by Manufacturers (2020-2025)
- 3.5 ICT Data Center Air Conditioning Market Share by Company Type (Tier 1, Tier 2, and Tier 3)
- 3.6 Global ICT Data Center Air Conditioning Average Price by Manufacturers (2020-2025)
- 3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types
- 3.8 ICT Data Center Air Conditioning Market Competitive Situation and Trends
  - 3.8.1 ICT Data Center Air Conditioning Market Concentration Rate

3.8.2 Global 5 and 10 Largest ICT Data Center Air Conditioning Players Market Share by Revenue

3.8.3 Mergers & Acquisitions, Expansion

## **4 ICT DATA CENTER AIR CONDITIONING INDUSTRY CHAIN ANALYSIS**

4.1 ICT Data Center Air Conditioning Industry Chain Analysis

4.2 Market Overview of Key Raw Materials

4.3 Midstream Market Analysis

4.4 Downstream Customer Analysis

## **5 THE DEVELOPMENT AND DYNAMICS OF ICT DATA CENTER AIR CONDITIONING MARKET**

5.1 Key Development Trends

5.2 Driving Factors

5.3 Market Challenges

5.4 Industry News

5.4.1 New Product Developments

5.4.2 Mergers & Acquisitions

5.4.3 Expansions

5.4.4 Collaboration/Supply Contracts

5.5 PEST Analysis

5.5.1 Industry Policies Analysis

5.5.2 Economic Environment Analysis

5.5.3 Social Environment Analysis

5.5.4 Technological Environment Analysis

5.6 Global ICT Data Center Air Conditioning Market Porter's Five Forces Analysis

5.6.1 Global Trade Frictions

5.6.2 U.S. Tariff Policy ? April 2025

5.6.3 Global Trade Frictions and Their Impacts to ICT Data Center Air Conditioning Market

5.7 ESG Ratings of Leading Companies

## **6 ICT DATA CENTER AIR CONDITIONING MARKET SEGMENTATION BY TYPE**

6.1 Evaluation Matrix of Segment Market Development Potential (Type)

6.2 Global ICT Data Center Air Conditioning Sales Market Share by Type (2020-2025)

6.3 Global ICT Data Center Air Conditioning Market Size by Type (2020-2025)

6.4 Global ICT Data Center Air Conditioning Price by Type (2020-2025)

## **7 ICT DATA CENTER AIR CONDITIONING MARKET SEGMENTATION BY APPLICATION**

7.1 Evaluation Matrix of Segment Market Development Potential (Application)

7.2 Global ICT Data Center Air Conditioning Market Sales by Application (2020-2025)

7.3 Global ICT Data Center Air Conditioning Market Size (M USD) by Application (2020-2025)

7.4 Global ICT Data Center Air Conditioning Sales Growth Rate by Application (2020-2025)

## **8 ICT DATA CENTER AIR CONDITIONING MARKET SALES BY REGION**

8.1 Global ICT Data Center Air Conditioning Sales by Region

8.1.1 Global ICT Data Center Air Conditioning Sales by Region

8.1.2 Global ICT Data Center Air Conditioning Sales Market Share by Region

8.2 Global ICT Data Center Air Conditioning Market Size by Region

8.2.1 Global ICT Data Center Air Conditioning Market Size by Region

8.2.2 Global ICT Data Center Air Conditioning Market Size by Region

8.3 North America

8.3.1 North America ICT Data Center Air Conditioning Sales by Country

8.3.2 North America ICT Data Center Air Conditioning Market Size by Country

8.3.3 U.S. Market Overview

8.3.4 Canada Market Overview

8.3.5 Mexico Market Overview

8.4 Europe

8.4.1 Europe ICT Data Center Air Conditioning Sales by Country

8.4.2 Europe ICT Data Center Air Conditioning Market Size by Country

8.4.3 Germany Market Overview

8.4.4 France Market Overview

8.4.5 U.K. Market Overview

8.4.6 Italy Market Overview

8.4.7 Spain Market Overview

8.5 Asia Pacific

8.5.1 Asia Pacific ICT Data Center Air Conditioning Sales by Region

8.5.2 Asia Pacific ICT Data Center Air Conditioning Market Size by Region

8.5.3 China Market Overview

8.5.4 Japan Market Overview

- 8.5.5 South Korea Market Overview
- 8.5.6 India Market Overview
- 8.5.7 Southeast Asia Market Overview
- 8.6 South America
  - 8.6.1 South America ICT Data Center Air Conditioning Sales by Country
  - 8.6.2 South America ICT Data Center Air Conditioning Market Size by Country
  - 8.6.3 Brazil Market Overview
  - 8.6.4 Argentina Market Overview
  - 8.6.5 Columbia Market Overview
- 8.7 Middle East and Africa
  - 8.7.1 Middle East and Africa ICT Data Center Air Conditioning Sales by Region
  - 8.7.2 Middle East and Africa ICT Data Center Air Conditioning Market Size by Region
  - 8.7.3 Saudi Arabia Market Overview
  - 8.7.4 UAE Market Overview
  - 8.7.5 Egypt Market Overview
  - 8.7.6 Nigeria Market Overview
  - 8.7.7 South Africa Market Overview

## **9 ICT DATA CENTER AIR CONDITIONING MARKET PRODUCTION BY REGION**

- 9.1 Global Production of ICT Data Center Air Conditioning by Region(2020-2025)
- 9.2 Global ICT Data Center Air Conditioning Revenue Market Share by Region (2020-2025)
- 9.3 Global ICT Data Center Air Conditioning Production, Revenue, Price and Gross Margin (2020-2025)
- 9.4 North America ICT Data Center Air Conditioning Production
  - 9.4.1 North America ICT Data Center Air Conditioning Production Growth Rate (2020-2025)
  - 9.4.2 North America ICT Data Center Air Conditioning Production, Revenue, Price and Gross Margin (2020-2025)
- 9.5 Europe ICT Data Center Air Conditioning Production
  - 9.5.1 Europe ICT Data Center Air Conditioning Production Growth Rate (2020-2025)
  - 9.5.2 Europe ICT Data Center Air Conditioning Production, Revenue, Price and Gross Margin (2020-2025)
- 9.6 Japan ICT Data Center Air Conditioning Production (2020-2025)
  - 9.6.1 Japan ICT Data Center Air Conditioning Production Growth Rate (2020-2025)
  - 9.6.2 Japan ICT Data Center Air Conditioning Production, Revenue, Price and Gross Margin (2020-2025)
- 9.7 China ICT Data Center Air Conditioning Production (2020-2025)

- 9.7.1 China ICT Data Center Air Conditioning Production Growth Rate (2020-2025)
- 9.7.2 China ICT Data Center Air Conditioning Production, Revenue, Price and Gross Margin (2020-2025)

## **10 KEY COMPANIES PROFILE**

### 10.1 Vertiv

- 10.1.1 Vertiv Basic Information
- 10.1.2 Vertiv ICT Data Center Air Conditioning Product Overview
- 10.1.3 Vertiv ICT Data Center Air Conditioning Product Market Performance
- 10.1.4 Vertiv Business Overview
- 10.1.5 Vertiv SWOT Analysis
- 10.1.6 Vertiv Recent Developments

### 10.2 Stulz

- 10.2.1 Stulz Basic Information
- 10.2.2 Stulz ICT Data Center Air Conditioning Product Overview
- 10.2.3 Stulz ICT Data Center Air Conditioning Product Market Performance
- 10.2.4 Stulz Business Overview
- 10.2.5 Stulz SWOT Analysis
- 10.2.6 Stulz Recent Developments

### 10.3 Daikin

- 10.3.1 Daikin Basic Information
- 10.3.2 Daikin ICT Data Center Air Conditioning Product Overview
- 10.3.3 Daikin ICT Data Center Air Conditioning Product Market Performance
- 10.3.4 Daikin Business Overview
- 10.3.5 Daikin SWOT Analysis
- 10.3.6 Daikin Recent Developments

### 10.4 Mitsubishi Electric

- 10.4.1 Mitsubishi Electric Basic Information
- 10.4.2 Mitsubishi Electric ICT Data Center Air Conditioning Product Overview
- 10.4.3 Mitsubishi Electric ICT Data Center Air Conditioning Product Market Performance
- 10.4.4 Mitsubishi Electric Business Overview
- 10.4.5 Mitsubishi Electric Recent Developments

### 10.5 Schneider Electric

- 10.5.1 Schneider Electric Basic Information
- 10.5.2 Schneider Electric ICT Data Center Air Conditioning Product Overview
- 10.5.3 Schneider Electric ICT Data Center Air Conditioning Product Market Performance

- 10.5.4 Schneider Electric Business Overview
- 10.5.5 Schneider Electric Recent Developments
- 10.6 Envicool
  - 10.6.1 Envicool Basic Information
  - 10.6.2 Envicool ICT Data Center Air Conditioning Product Overview
  - 10.6.3 Envicool ICT Data Center Air Conditioning Product Market Performance
  - 10.6.4 Envicool Business Overview
  - 10.6.5 Envicool Recent Developments
- 10.7 Yimikang Tech
  - 10.7.1 Yimikang Tech Basic Information
  - 10.7.2 Yimikang Tech ICT Data Center Air Conditioning Product Overview
  - 10.7.3 Yimikang Tech ICT Data Center Air Conditioning Product Market Performance
  - 10.7.4 Yimikang Tech Business Overview
  - 10.7.5 Yimikang Tech Recent Developments
- 10.8 Gree
  - 10.8.1 Gree Basic Information
  - 10.8.2 Gree ICT Data Center Air Conditioning Product Overview
  - 10.8.3 Gree ICT Data Center Air Conditioning Product Market Performance
  - 10.8.4 Gree Business Overview
  - 10.8.5 Gree Recent Developments
- 10.9 Midea
  - 10.9.1 Midea Basic Information
  - 10.9.2 Midea ICT Data Center Air Conditioning Product Overview
  - 10.9.3 Midea ICT Data Center Air Conditioning Product Market Performance
  - 10.9.4 Midea Business Overview
  - 10.9.5 Midea Recent Developments
- 10.10 Canatal
  - 10.10.1 Canatal Basic Information
  - 10.10.2 Canatal ICT Data Center Air Conditioning Product Overview
  - 10.10.3 Canatal ICT Data Center Air Conditioning Product Market Performance
  - 10.10.4 Canatal Business Overview
  - 10.10.5 Canatal Recent Developments
- 10.11 Eaton
  - 10.11.1 Eaton Basic Information
  - 10.11.2 Eaton ICT Data Center Air Conditioning Product Overview
  - 10.11.3 Eaton ICT Data Center Air Conditioning Product Market Performance
  - 10.11.4 Eaton Business Overview
  - 10.11.5 Eaton Recent Developments
- 10.12 Shenling Environmental Systems

- 10.12.1 Shenling Environmental Systems Basic Information
- 10.12.2 Shenling Environmental Systems ICT Data Center Air Conditioning Product Overview
- 10.12.3 Shenling Environmental Systems ICT Data Center Air Conditioning Product Market Performance
- 10.12.4 Shenling Environmental Systems Business Overview
- 10.12.5 Shenling Environmental Systems Recent Developments
- 10.13 Euroklimat
  - 10.13.1 Euroklimat Basic Information
  - 10.13.2 Euroklimat ICT Data Center Air Conditioning Product Overview
  - 10.13.3 Euroklimat ICT Data Center Air Conditioning Product Market Performance
  - 10.13.4 Euroklimat Business Overview
  - 10.13.5 Euroklimat Recent Developments
- 10.14 Haier
  - 10.14.1 Haier Basic Information
  - 10.14.2 Haier ICT Data Center Air Conditioning Product Overview
  - 10.14.3 Haier ICT Data Center Air Conditioning Product Market Performance
  - 10.14.4 Haier Business Overview
  - 10.14.5 Haier Recent Developments
- 10.15 Hisense
  - 10.15.1 Hisense Basic Information
  - 10.15.2 Hisense ICT Data Center Air Conditioning Product Overview
  - 10.15.3 Hisense ICT Data Center Air Conditioning Product Market Performance
  - 10.15.4 Hisense Business Overview
  - 10.15.5 Hisense Recent Developments
- 10.16 Airsys
  - 10.16.1 Airsys Basic Information
  - 10.16.2 Airsys ICT Data Center Air Conditioning Product Overview
  - 10.16.3 Airsys ICT Data Center Air Conditioning Product Market Performance
  - 10.16.4 Airsys Business Overview
  - 10.16.5 Airsys Recent Developments
- 10.17 iTeaQ
  - 10.17.1 iTeaQ Basic Information
  - 10.17.2 iTeaQ ICT Data Center Air Conditioning Product Overview
  - 10.17.3 iTeaQ ICT Data Center Air Conditioning Product Market Performance
  - 10.17.4 iTeaQ Business Overview
  - 10.17.5 iTeaQ Recent Developments
- 10.18 Blackshields Environment
  - 10.18.1 Blackshields Environment Basic Information

- 10.18.2 Blackshields Environment ICT Data Center Air Conditioning Product Overview
- 10.18.3 Blackshields Environment ICT Data Center Air Conditioning Product Market Performance
- 10.18.4 Blackshields Environment Business Overview
- 10.18.5 Blackshields Environment Recent Developments
- 10.19 Jirong Air-conditioning
  - 10.19.1 Jirong Air-conditioning Basic Information
  - 10.19.2 Jirong Air-conditioning ICT Data Center Air Conditioning Product Overview
  - 10.19.3 Jirong Air-conditioning ICT Data Center Air Conditioning Product Market Performance
  - 10.19.4 Jirong Air-conditioning Business Overview
  - 10.19.5 Jirong Air-conditioning Recent Developments

## **11 ICT DATA CENTER AIR CONDITIONING MARKET FORECAST BY REGION**

- 11.1 Global ICT Data Center Air Conditioning Market Size Forecast
- 11.2 Global ICT Data Center Air Conditioning Market Forecast by Region
  - 11.2.1 North America Market Size Forecast by Country
  - 11.2.2 Europe ICT Data Center Air Conditioning Market Size Forecast by Country
  - 11.2.3 Asia Pacific ICT Data Center Air Conditioning Market Size Forecast by Region
  - 11.2.4 South America ICT Data Center Air Conditioning Market Size Forecast by Country
  - 11.2.5 Middle East and Africa Forecasted Sales of ICT Data Center Air Conditioning by Country

## **12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)**

- 12.1 Global ICT Data Center Air Conditioning Market Forecast by Type (2026-2035)
  - 12.1.1 Global Forecasted Sales of ICT Data Center Air Conditioning by Type (2026-2035)
  - 12.1.2 Global ICT Data Center Air Conditioning Market Size Forecast by Type (2026-2035)
  - 12.1.3 Global Forecasted Price of ICT Data Center Air Conditioning by Type (2026-2035)
- 12.2 Global ICT Data Center Air Conditioning Market Forecast by Application (2026-2035)
  - 12.2.1 Global ICT Data Center Air Conditioning Sales (K Units) Forecast by Application
  - 12.2.2 Global ICT Data Center Air Conditioning Market Size (M USD) Forecast by

Application (2026-2035)

## **13 CONCLUSION AND KEY FINDINGS**

## List Of Tables

### LIST OF TABLES

Table 1. Introduction of the Type

Table 2. Introduction of the Application

Table 3. Global ICT Data Center Air Conditioning Market Size by Type (M USD)

Table 4. Global ICT Data Center Air Conditioning Market Size by Application

Table 5. ICT Data Center Air Conditioning Market Size Comparison by Region (M USD)

Table 6. Global ICT Data Center Air Conditioning Sales (K Units) by Manufacturers (2020-2025)

Table 7. Global ICT Data Center Air Conditioning Sales Market Share by Manufacturers (2020-2025)

Table 8. Global ICT Data Center Air Conditioning Revenue (M USD) by Manufacturers (2020-2025)

Table 9. Global ICT Data Center Air Conditioning Revenue Share by Manufacturers (2020-2025)

Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in ICT Data Center Air Conditioning as of 2025)

Table 11. Global Market ICT Data Center Air Conditioning Average Price (USD/Unit) of Key Manufacturers (2020-2025)

Table 12. Manufacturers? Manufacturing Sites, Areas Served

Table 13. Manufacturers? Product Type

Table 14. Global ICT Data Center Air Conditioning Manufacturers Market Concentration Ratio (CR5 and HHI)

Table 15. Mergers & Acquisitions, Expansion Plans

Table 16. Market Overview of Key Raw Materials

Table 17. Midstream Market Analysis

Table 18. Downstream Customer Analysis

Table 19. Key Development Trends

Table 20. Driving Factors

Table 21. ICT Data Center Air Conditioning Market Challenges

Table 22. Goldman Sachs' forecast real GDP growth rate for 2025-2026

Table 23. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027

Table 24. World Bank ' Forecast Real GDP Growth Rate For 2025-2026

Table 25. The Tariff Rates Imposed by the United States on Major Commodity Trading Countries

Table 26. Global ICT Data Center Air Conditioning Sales by Type (K Units)

Table 27. Global ICT Data Center Air Conditioning Market Size by Type (M USD)

Table 28. Global ICT Data Center Air Conditioning Sales (K Units) by Type (2020-2025)

Table 29. Global ICT Data Center Air Conditioning Sales Market Share by Type (2020-2025)

Table 30. Global ICT Data Center Air Conditioning Market Size (M USD) by Type (2020-2025)

Table 31. Global ICT Data Center Air Conditioning Market Share by Type (2020-2025)

Table 32. Global ICT Data Center Air Conditioning Price (USD/Unit) by Type (2020-2025)

Table 33. Global ICT Data Center Air Conditioning Sales (K Units) by Application

Table 34. Global ICT Data Center Air Conditioning Market Size by Application

Table 35. Global ICT Data Center Air Conditioning Sales by Application (2020-2025) & (K Units)

Table 36. Global ICT Data Center Air Conditioning Sales Market Share by Application (2020-2025)

Table 37. Global ICT Data Center Air Conditioning Market Size by Application (2020-2025) & (M USD)

Table 38. Global ICT Data Center Air Conditioning Market Share by Application (2020-2025)

Table 39. Global ICT Data Center Air Conditioning Sales Growth Rate by Application (2020-2025)

Table 40. Global ICT Data Center Air Conditioning Sales by Region (2020-2025) & (K Units)

Table 41. Global ICT Data Center Air Conditioning Sales Market Share by Region (2020-2025)

Table 42. Global ICT Data Center Air Conditioning Market Size by Region (2020-2025) & (M USD)

Table 43. Global ICT Data Center Air Conditioning Market Size by Region (2020-2025)

Table 44. North America ICT Data Center Air Conditioning Sales by Country (2020-2025) & (K Units)

Table 45. North America ICT Data Center Air Conditioning Market Size by Country (2020-2025) & (M USD)

Table 46. Europe ICT Data Center Air Conditioning Sales by Country (2020-2025) & (K Units)

Table 47. Europe ICT Data Center Air Conditioning Market Size by Country (2020-2025) & (M USD)

Table 48. Asia Pacific ICT Data Center Air Conditioning Sales by Region (2020-2025) & (K Units)

Table 49. Asia Pacific ICT Data Center Air Conditioning Market Size by Region (2020-2025) & (M USD)

- Table 50. South America ICT Data Center Air Conditioning Sales by Country (2020-2025) & (K Units)
- Table 51. South America ICT Data Center Air Conditioning Market Size by Country (2020-2025) & (M USD)
- Table 52. Middle East and Africa ICT Data Center Air Conditioning Sales by Region (2020-2025) & (K Units)
- Table 53. Middle East and Africa ICT Data Center Air Conditioning Market Size by Region (2020-2025) & (M USD)
- Table 54. Global ICT Data Center Air Conditioning Production (K Units) by Region(2020-2025)
- Table 55. Global ICT Data Center Air Conditioning Revenue (US\$ Million) by Region (2020-2025)
- Table 56. Global ICT Data Center Air Conditioning Revenue Market Share by Region (2020-2025)
- Table 57. Global ICT Data Center Air Conditioning Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 58. North America ICT Data Center Air Conditioning Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 59. Europe ICT Data Center Air Conditioning Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 60. Japan ICT Data Center Air Conditioning Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 61. China ICT Data Center Air Conditioning Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 62. Vertiv Basic Information
- Table 63. Vertiv ICT Data Center Air Conditioning Product Overview
- Table 64. Vertiv ICT Data Center Air Conditioning Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 65. Vertiv Business Overview
- Table 66. Vertiv SWOT Analysis
- Table 67. Vertiv Recent Developments
- Table 68. Stulz Basic Information
- Table 69. Stulz ICT Data Center Air Conditioning Product Overview
- Table 70. Stulz ICT Data Center Air Conditioning Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 71. Stulz Business Overview
- Table 72. Stulz SWOT Analysis
- Table 73. Stulz Recent Developments
- Table 74. Daikin Basic Information

- Table 75. Daikin ICT Data Center Air Conditioning Product Overview
- Table 76. Daikin ICT Data Center Air Conditioning Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 77. Daikin Business Overview
- Table 78. Daikin SWOT Analysis
- Table 79. Daikin Recent Developments
- Table 80. Mitsubishi Electric Basic Information
- Table 81. Mitsubishi Electric ICT Data Center Air Conditioning Product Overview
- Table 82. Mitsubishi Electric ICT Data Center Air Conditioning Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 83. Mitsubishi Electric Business Overview
- Table 84. Mitsubishi Electric Recent Developments
- Table 85. Schneider Electric Basic Information
- Table 86. Schneider Electric ICT Data Center Air Conditioning Product Overview
- Table 87. Schneider Electric ICT Data Center Air Conditioning Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 88. Schneider Electric Business Overview
- Table 89. Schneider Electric Recent Developments
- Table 90. Envicool Basic Information
- Table 91. Envicool ICT Data Center Air Conditioning Product Overview
- Table 92. Envicool ICT Data Center Air Conditioning Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 93. Envicool Business Overview
- Table 94. Envicool Recent Developments
- Table 95. Yimikang Tech Basic Information
- Table 96. Yimikang Tech ICT Data Center Air Conditioning Product Overview
- Table 97. Yimikang Tech ICT Data Center Air Conditioning Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 98. Yimikang Tech Business Overview
- Table 99. Yimikang Tech Recent Developments
- Table 100. Gree Basic Information
- Table 101. Gree ICT Data Center Air Conditioning Product Overview
- Table 102. Gree ICT Data Center Air Conditioning Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 103. Gree Business Overview
- Table 104. Gree Recent Developments
- Table 105. Midea Basic Information
- Table 106. Midea ICT Data Center Air Conditioning Product Overview
- Table 107. Midea ICT Data Center Air Conditioning Sales (K Units), Revenue (M USD),

Price (USD/Unit) and Gross Margin (2020-2025)

Table 108. Midea Business Overview

Table 109. Midea Recent Developments

Table 110. Canatal Basic Information

Table 111. Canatal ICT Data Center Air Conditioning Product Overview

Table 112. Canatal ICT Data Center Air Conditioning Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 113. Canatal Business Overview

Table 114. Canatal Recent Developments

Table 115. Eaton Basic Information

Table 116. Eaton ICT Data Center Air Conditioning Product Overview

Table 117. Eaton ICT Data Center Air Conditioning Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 118. Eaton Business Overview

Table 119. Eaton Recent Developments

Table 120. Shenling Environmental Systems Basic Information

Table 121. Shenling Environmental Systems ICT Data Center Air Conditioning Product Overview

Table 122. Shenling Environmental Systems ICT Data Center Air Conditioning Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 123. Shenling Environmental Systems Business Overview

Table 124. Shenling Environmental Systems Recent Developments

Table 125. Euroklimat Basic Information

Table 126. Euroklimat ICT Data Center Air Conditioning Product Overview

Table 127. Euroklimat ICT Data Center Air Conditioning Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 128. Euroklimat Business Overview

Table 129. Euroklimat Recent Developments

Table 130. Haier Basic Information

Table 131. Haier ICT Data Center Air Conditioning Product Overview

Table 132. Haier ICT Data Center Air Conditioning Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 133. Haier Business Overview

Table 134. Haier Recent Developments

Table 135. Hisense Basic Information

Table 136. Hisense ICT Data Center Air Conditioning Product Overview

Table 137. Hisense ICT Data Center Air Conditioning Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 138. Hisense Business Overview

- Table 139. Hisense Recent Developments
- Table 140. Airsys Basic Information
- Table 141. Airsys ICT Data Center Air Conditioning Product Overview
- Table 142. Airsys ICT Data Center Air Conditioning Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 143. Airsys Business Overview
- Table 144. Airsys Recent Developments
- Table 145. iTeaQ Basic Information
- Table 146. iTeaQ ICT Data Center Air Conditioning Product Overview
- Table 147. iTeaQ ICT Data Center Air Conditioning Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 148. iTeaQ Business Overview
- Table 149. iTeaQ Recent Developments
- Table 150. Blackshields Environment Basic Information
- Table 151. Blackshields Environment ICT Data Center Air Conditioning Product Overview
- Table 152. Blackshields Environment ICT Data Center Air Conditioning Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 153. Blackshields Environment Business Overview
- Table 154. Blackshields Environment Recent Developments
- Table 155. Jirong Air-conditioning Basic Information
- Table 156. Jirong Air-conditioning ICT Data Center Air Conditioning Product Overview
- Table 157. Jirong Air-conditioning ICT Data Center Air Conditioning Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 158. Jirong Air-conditioning Business Overview
- Table 159. Jirong Air-conditioning Recent Developments
- Table 160. Global ICT Data Center Air Conditioning Sales Forecast by Region (2026-2035) & (K Units)
- Table 161. Global ICT Data Center Air Conditioning Market Size Forecast by Region (2026-2035) & (M USD)
- Table 162. North America ICT Data Center Air Conditioning Sales Forecast by Country (2026-2035) & (K Units)
- Table 163. North America ICT Data Center Air Conditioning Market Size Forecast by Country (2026-2035) & (M USD)
- Table 164. Europe ICT Data Center Air Conditioning Sales Forecast by Country (2026-2035) & (K Units)
- Table 165. Europe ICT Data Center Air Conditioning Market Size Forecast by Country (2026-2035) & (M USD)
- Table 166. Asia Pacific ICT Data Center Air Conditioning Sales Forecast by Region

(2026-2035) & (K Units)

Table 167. Asia Pacific ICT Data Center Air Conditioning Market Size Forecast by Region (2026-2035) & (M USD)

Table 168. South America ICT Data Center Air Conditioning Sales Forecast by Country (2026-2035) & (K Units)

Table 169. South America ICT Data Center Air Conditioning Market Size Forecast by Country (2026-2035) & (M USD)

Table 170. Middle East and Africa ICT Data Center Air Conditioning Sales Forecast by Country (2026-2035) & (Units)

Table 171. Middle East and Africa ICT Data Center Air Conditioning Market Size Forecast by Country (2026-2035) & (M USD)

Table 172. Global ICT Data Center Air Conditioning Sales Forecast by Type (2026-2035) & (K Units)

Table 173. Global ICT Data Center Air Conditioning Market Size Forecast by Type (2026-2035) & (M USD)

Table 174. Global ICT Data Center Air Conditioning Price Forecast by Type (2026-2035) & (USD/Unit)

Table 175. Global ICT Data Center Air Conditioning Sales (K Units) Forecast by Application (2026-2035)

Table 176. Global ICT Data Center Air Conditioning Market Size Forecast by Application (2026-2035) & (M USD)

## List Of Figures

### LIST OF FIGURES

- Figure 1. Product Picture of ICT Data Center Air Conditioning
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global ICT Data Center Air Conditioning Market Size (M USD), 2025-2035
- Figure 5. Global ICT Data Center Air Conditioning Market Size (M USD) (2020-2035)
- Figure 6. Global ICT Data Center Air Conditioning Sales (K Units) & (2020-2035)
- Figure 7. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 8. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 9. Evaluation Matrix of Regional Market Development Potential
- Figure 10. ICT Data Center Air Conditioning Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global ICT Data Center Air Conditioning Product Life Cycle
- Figure 13. ICT Data Center Air Conditioning Sales Share by Manufacturers in 2025
- Figure 14. Global ICT Data Center Air Conditioning Revenue Share by Manufacturers in 2025
- Figure 15. ICT Data Center Air Conditioning Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market ICT Data Center Air Conditioning Average Price (USD/Unit) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by ICT Data Center Air Conditioning Revenue in 2025
- Figure 18. Industry Chain Map of ICT Data Center Air Conditioning
- Figure 19. Global ICT Data Center Air Conditioning Market PEST Analysis
- Figure 20. Global ICT Data Center Air Conditioning Market Porter's Five Forces Analysis
- Figure 21. Global Merchandise Trade as a Percentage Of GDP
- Figure 22. US - Imports of Goods by Country
- Figure 23. China Exports by Country
- Figure 24. ESG Rating Distribution of The Leading Company Compared With Its Peers
- Figure 25. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 26. Global ICT Data Center Air Conditioning Market Share by Type
- Figure 27. Sales Market Share of ICT Data Center Air Conditioning by Type (2020-2025)
- Figure 28. Sales Market Share of ICT Data Center Air Conditioning by Type in 2025
- Figure 29. Market Share of ICT Data Center Air Conditioning by Type (2020-2025)

- Figure 30. Market Share of ICT Data Center Air Conditioning by Type in 2025
- Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 32. Global ICT Data Center Air Conditioning Market Share by Application
- Figure 33. Global ICT Data Center Air Conditioning Sales Market Share by Application (2020-2025)
- Figure 34. Global ICT Data Center Air Conditioning Sales Market Share by Application in 2025
- Figure 35. Global ICT Data Center Air Conditioning Market Share by Application (2020-2025)
- Figure 36. Global ICT Data Center Air Conditioning Market Share by Application in 2025
- Figure 37. Global ICT Data Center Air Conditioning Sales Growth Rate by Application (2020-2025)
- Figure 38. Global ICT Data Center Air Conditioning Sales Market Share by Region (2020-2025)
- Figure 39. Global ICT Data Center Air Conditioning Market Size by Region (2020-2025)
- Figure 40. North America ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)
- Figure 41. North America ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)
- Figure 42. North America ICT Data Center Air Conditioning Sales Market Share by Country in 2024
- Figure 43. North America ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 44. North America ICT Data Center Air Conditioning Market Size by Country in 2024
- Figure 45. U.S. ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)
- Figure 46. U.S. ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 47. Canada ICT Data Center Air Conditioning Sales (K Units) and Growth Rate (2020-2025)
- Figure 48. Canada ICT Data Center Air Conditioning Market Size (M USD) and Growth Rate (2020-2025)
- Figure 49. Mexico ICT Data Center Air Conditioning Sales (Units) and Growth Rate (2020-2025)
- Figure 50. Mexico ICT Data Center Air Conditioning Market Size (Units) and Growth Rate (2020-2025)
- Figure 51. Europe ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)

Figure 52. Europe ICT Data Center Air Conditioning Sales Market Share by Country in 2024

Figure 53. Europe ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)

Figure 54. Europe ICT Data Center Air Conditioning Market Size by Country in 2024

Figure 55. Germany ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)

Figure 56. Germany ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)

Figure 57. France ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)

Figure 58. France ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)

Figure 59. U.K. ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)

Figure 60. U.K. ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)

Figure 62. Italy ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)

Figure 64. Spain ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific ICT Data Center Air Conditioning Sales and Growth Rate (K Units)

Figure 66. Asia Pacific ICT Data Center Air Conditioning Sales Market Share by Region in 2024

Figure 67. Asia Pacific ICT Data Center Air Conditioning Market Size by Region in 2024

Figure 68. China ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)

Figure 69. China ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)

Figure 71. Japan ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)

Figure 72. South Korea ICT Data Center Air Conditioning Sales and Growth Rate

(2020-2025) & (K Units)

Figure 73. South Korea ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)

Figure 74. India ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)

Figure 75. India ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)

Figure 76. Southeast Asia ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)

Figure 77. Southeast Asia ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)

Figure 78. South America ICT Data Center Air Conditioning Sales and Growth Rate (K Units)

Figure 79. South America ICT Data Center Air Conditioning Sales Market Share by Country in 2024

Figure 80. South America ICT Data Center Air Conditioning Market Size and Growth Rate (M USD)

Figure 81. South America ICT Data Center Air Conditioning Market Size by Country in 2024

Figure 82. Brazil ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)

Figure 83. Brazil ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)

Figure 84. Argentina ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)

Figure 85. Argentina ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)

Figure 86. Columbia ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)

Figure 87. Columbia ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)

Figure 88. Middle East and Africa ICT Data Center Air Conditioning Sales and Growth Rate (K Units)

Figure 89. Middle East and Africa ICT Data Center Air Conditioning Sales Market Share by Region in 2024

Figure 90. Middle East and Africa ICT Data Center Air Conditioning Market Size and Growth Rate (M USD)

Figure 91. Middle East and Africa ICT Data Center Air Conditioning Market Size by Region in 2024

Figure 92. Saudi Arabia ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)

Figure 93. Saudi Arabia ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)

Figure 94. UAE ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)

Figure 95. UAE ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)

Figure 96. Egypt ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)

Figure 97. Egypt ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)

Figure 98. Nigeria ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)

Figure 99. Nigeria ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)

Figure 100. South Africa ICT Data Center Air Conditioning Sales and Growth Rate (2020-2025) & (K Units)

Figure 101. South Africa ICT Data Center Air Conditioning Market Size and Growth Rate (2020-2025) & (M USD)

Figure 102. Global ICT Data Center Air Conditioning Production Market Share by Region (2020-2025)

Figure 103. North America ICT Data Center Air Conditioning Production (K Units) Growth Rate (2020-2025)

Figure 104. Europe ICT Data Center Air Conditioning Production (K Units) Growth Rate (2020-2025)

Figure 105. Japan ICT Data Center Air Conditioning Production (K Units) Growth Rate (2020-2025)

Figure 106. China ICT Data Center Air Conditioning Production (K Units) Growth Rate (2020-2025)

Figure 107. Global ICT Data Center Air Conditioning Sales Forecast by Volume (2020-2035) & (K Units)

Figure 108. Global ICT Data Center Air Conditioning Market Size Forecast by Value (2020-2035) & (M USD)

Figure 109. Global ICT Data Center Air Conditioning Sales Market Share Forecast by Type (2026-2035)

Figure 110. Global ICT Data Center Air Conditioning Market Share Forecast by Type (2026-2035)

Figure 111. Global ICT Data Center Air Conditioning Sales Forecast by Application

(2026-2035)

Figure 112. Global ICT Data Center Air Conditioning Market Share Forecast by Application (2026-2035)

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