

Global Cooling Fan Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Cooling Fan market size is expected to reach \$ 18407 million by 2032, rising at a market growth of 3.5% CAGR during the forecast period (2026-2032).

The cooling fans market and manufacturers are separated into two major group. If we divide them by the size of the fans, we can consider 200mm is the border. Different manufacturers and application could deviate it (200mm). The size above 200mm cooling fans market demand comes from ventilation, agriculture, mining, marine etc. The manufacturers in this area typically are EBM, ZIEHL, Aerovent, Horton, DELTA, Roserberg, etc. Even though you may see Aerovent says they also provide fans for automotive, but actually not. Their fans are only for ventilation system in automotive factory. The size below and equal to 200mm market demand comes from Automobile and Transportation, consumer, telecom, Home Appliance etc. and it is used for cooling the environment of machine working. The manufacturers are DELTA, NIDEC, NMB, SUNON, ADDA, EBM, AVC, Sanyo Denki, etc.

The cooling fan industry is an important part of the electronic thermal management and airflow control sector. Its products are widely used in servers and data centers, communication equipment, industrial automation, power electronics, new energy vehicles, home appliances, security and surveillance systems, medical devices, and consumer electronics. The industry as a whole is characterized by a broad application base, fragmented downstream demand, and continuous technological iteration. Demand trends are closely tied to rising power density in electronic equipment, ongoing miniaturization, increasingly stringent reliability requirements, and the growing emphasis on energy efficiency and noise reduction. In recent years, as servers, high-computing-power equipment, new energy vehicle thermal management systems, power supply systems, and industrial control equipment have placed higher demands on heat

dissipation efficiency and operational stability, the cooling fan industry has continued to evolve toward higher airflow, higher static pressure, greater energy efficiency, longer service life, and smarter control. Cooling fans have gradually moved beyond their traditional role as standardized components and become key parts that directly affect overall system performance, reliability, and service life.

From a regional perspective, Asia remains the core production and consumption hub for cooling fans, with mainland China, Taiwan, Japan, and South Korea showing clear advantages in supply chain completeness, electronics manufacturing support capabilities, and export scale. North America and Europe, by contrast, are more concentrated in high-end application markets and brand-driven segments, with strong demand in high-reliability fields such as servers, industrial control, automotive electronics, and medical devices. In terms of product structure, the industry is mainly divided into axial fans, centrifugal fans, cross-flow fans, and related fan modules. Among these, axial fans are the most widely used in standard electronic cooling scenarios, while centrifugal fans are more commonly used in equipment requiring higher air pressure, more complex airflow paths, or operation in space-constrained environments. Further segmentation by size, bearing type, operating voltage, speed control method, and protection rating leads to a high degree of product differentiation. In terms of downstream application structure, servers and data centers, communication equipment, industrial equipment, and automotive electronics are the core sectors with relatively high value per unit, while consumer electronics and home appliances account for a relatively high share of shipment volume but face more intense price competition.

From the manufacturing side, the cost structure of cooling fans is typically dominated by raw materials and core components, mainly including plastic parts, copper wire, silicon steel sheets or magnetic materials, bearings, shafts, electronic control boards, and connecting wire harnesses. Among these, the motor system, bearing system, and impeller design directly affect product efficiency, noise, service life, and consistency. The production process centers on injection molding, stamping, motor winding, magnetic circuit assembly, dynamic balancing, final assembly, and performance testing, making it a mechatronics manufacturing field with a steadily rising degree of automation. In terms of single-line production capacity, standardized small-sized axial fan lines can typically achieve annual output ranging from hundreds of thousands to several million units under a high level of automation. By contrast, medium- and large-sized industrial fans and highly reliable customized products generally have lower single-line capacity because of more complex testing procedures and more frequent model switching. In terms of gross margin, the industry overall is usually at a moderate level. Standardized products tend to have relatively lower gross margins, while high-end

server fans, automotive-grade fans, and long-life industrial fans generally achieve better margins due to certification barriers, stricter reliability requirements, and stronger customer stickiness.

From the perspective of industry chain structure, upstream segments mainly include suppliers of engineering plastics, copper materials, magnetic materials, bearings, electronic components, molds, and automation equipment. The midstream consists of cooling fan and fan module manufacturers, while downstream covers server manufacturers, power supply manufacturers, automotive component companies, industrial equipment manufacturers, home appliance producers, and EMS companies. The competitive landscape shows clear polarization. One group of companies relies on large-scale manufacturing, cost control, and delivery capability to secure advantages in the standardized market. Another group builds barriers in the high-end market through motor design, impeller simulation, low-noise optimization, control algorithms, automotive-grade validation, and global customer certification systems. Overall, leading companies usually possess multi-regional production layouts, strong binding with major customers, and comprehensive product portfolios, while small and medium-sized enterprises are more concentrated in mid- to low-end substitution, regional supply, and niche customization markets. Barriers to entry are reflected not only in manufacturing capability, but also in long-term reliability validation, safety certification, customer qualification cycles, and stable long-term supply capability.

Looking ahead, the development of the cooling fan industry is expected to move in several main directions. First, with the upgrading of AI servers, high-power power supplies, energy storage equipment, and new energy vehicle electronic architectures, demand for products featuring higher airflow, higher static pressure, higher rotational speed, and higher reliability will continue to rise. Second, products will further evolve toward intelligence and system integration, with PWM speed control, speed monitoring, fault warning, temperature-linked control, and modular supply becoming important directions. Third, stricter requirements for low noise, low power consumption, and high energy efficiency will continue to drive improvements in impeller design, motor efficiency, and material systems. Fourth, downstream customers are placing greater emphasis on localized supply, rapid development, and customization capability, making manufacturers with global delivery capacity and local service capability more competitive. Fifth, from a competitive standpoint, the mid- and low-end market will continue to face pricing pressure, while high-end application fields will place greater emphasis on technological upgrading, certification accumulation, and comprehensive service capability. Overall, the cooling fan industry has gradually shifted from competition centered on general-purpose standalone components to a more

comprehensive competitive model focused on performance, reliability, customization, and supply chain collaboration.

This report studies the global Cooling Fan production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Cooling Fan and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Cooling Fan that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Cooling Fan total production and demand, 2021-2032, (Million Units)

Global Cooling Fan total production value, 2021-2032, (USD Million)

Global Cooling Fan production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global Cooling Fan consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: Cooling Fan domestic production, consumption, key domestic manufacturers and share

Global Cooling Fan production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global Cooling Fan production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global Cooling Fan production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global Cooling Fan market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a

part of this study include Ebm-papst, ZIEHL Abegg, Delta Group, AVC, SUNON, NMB, DENSO, SANYO DENKI, SPAL Automotive, Nidec Corporation, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Cooling Fan market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Million Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Cooling Fan Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Cooling Fan Market, Segmentation by Type:

Axial Fans

Centrifugal Fans

Others

Global Cooling Fan Market, Segmentation by Input Voltage:

5V

12V

24V

48V

Others

Global Cooling Fan Market, Segmentation by Sales Channel:

Direct Sales

Distribution

Global Cooling Fan Market, Segmentation by Application:

Ventilation

Agriculture

Mining

Automobile

Server

Telecom

Home Appliance

Computer and Office Equipment

Others

Companies Profiled:

Ebm-papst

ZIEHL Abegg

Delta Group

AVC

SUNON

NMB

DENSO

SANYO DENKI

SPAL Automotive

Nidec Corporation

Rosenberg

Aerovent

Horton

Multi-Wing

Guangdong Shenghui Technology

AMETEK.Inc

ADDA

Key Questions Answered:

1. How big is the global Cooling Fan market?
2. What is the demand of the global Cooling Fan market?
3. What is the year over year growth of the global Cooling Fan market?
4. What is the production and production value of the global Cooling Fan market?
5. Who are the key producers in the global Cooling Fan market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Cooling Fan Introduction
- 1.2 World Cooling Fan Supply & Forecast
 - 1.2.1 World Cooling Fan Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Cooling Fan Production (2021-2032)
 - 1.2.3 World Cooling Fan Pricing Trends (2021-2032)
- 1.3 World Cooling Fan Production by Region (Based on Production Site)
 - 1.3.1 World Cooling Fan Production Value by Region (2021-2032)
 - 1.3.2 World Cooling Fan Production by Region (2021-2032)
 - 1.3.3 World Cooling Fan Average Price by Region (2021-2032)
 - 1.3.4 North America Cooling Fan Production (2021-2032)
 - 1.3.5 Europe Cooling Fan Production (2021-2032)
 - 1.3.6 China Cooling Fan Production (2021-2032)
 - 1.3.7 Japan Cooling Fan Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Cooling Fan Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Cooling Fan Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Cooling Fan Demand (2021-2032)
- 2.2 World Cooling Fan Consumption by Region
 - 2.2.1 World Cooling Fan Consumption by Region (2021-2026)
 - 2.2.2 World Cooling Fan Consumption Forecast by Region (2027-2032)
- 2.3 United States Cooling Fan Consumption (2021-2032)
- 2.4 China Cooling Fan Consumption (2021-2032)
- 2.5 Europe Cooling Fan Consumption (2021-2032)
- 2.6 Japan Cooling Fan Consumption (2021-2032)
- 2.7 South Korea Cooling Fan Consumption (2021-2032)
- 2.8 ASEAN Cooling Fan Consumption (2021-2032)
- 2.9 India Cooling Fan Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Cooling Fan Production Value by Manufacturer (2021-2026)

- 3.2 World Cooling Fan Production by Manufacturer (2021-2026)
- 3.3 World Cooling Fan Average Price by Manufacturer (2021-2026)
- 3.4 Cooling Fan Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Cooling Fan Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Cooling Fan in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Cooling Fan in 2025
- 3.6 Cooling Fan Market: Overall Company Footprint Analysis
 - 3.6.1 Cooling Fan Market: Region Footprint
 - 3.6.2 Cooling Fan Market: Company Product Type Footprint
 - 3.6.3 Cooling Fan Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Cooling Fan Production Value Comparison
 - 4.1.1 United States VS China: Cooling Fan Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Cooling Fan Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Cooling Fan Production Comparison
 - 4.2.1 United States VS China: Cooling Fan Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Cooling Fan Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Cooling Fan Consumption Comparison
 - 4.3.1 United States VS China: Cooling Fan Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Cooling Fan Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Cooling Fan Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Cooling Fan Manufacturers, Headquarters and Production Site (States, Country)
 - 4.4.2 United States Based Manufacturers Cooling Fan Production Value (2021-2026)

- 4.4.3 United States Based Manufacturers Cooling Fan Production (2021-2026)
- 4.5 China Based Cooling Fan Manufacturers and Market Share
 - 4.5.1 China Based Cooling Fan Manufacturers, Headquarters and Production Site (Province, Country)
 - 4.5.2 China Based Manufacturers Cooling Fan Production Value (2021-2026)
 - 4.5.3 China Based Manufacturers Cooling Fan Production (2021-2026)
- 4.6 Rest of World Based Cooling Fan Manufacturers and Market Share, 2021-2026
 - 4.6.1 Rest of World Based Cooling Fan Manufacturers, Headquarters and Production Site (State, Country)
 - 4.6.2 Rest of World Based Manufacturers Cooling Fan Production Value (2021-2026)
 - 4.6.3 Rest of World Based Manufacturers Cooling Fan Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

- 5.1 World Cooling Fan Market Size Overview by Type: 2021 VS 2025 VS 2032
- 5.2 Segment Introduction by Type
 - 5.2.1 Axial Fans
 - 5.2.2 Centrifugal Fans
 - 5.2.3 Others
- 5.3 Market Segment by Type
 - 5.3.1 World Cooling Fan Production by Type (2021-2032)
 - 5.3.2 World Cooling Fan Production Value by Type (2021-2032)
 - 5.3.3 World Cooling Fan Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY INPUT VOLTAGE

- 6.1 World Cooling Fan Market Size Overview by Input Voltage: 2021 VS 2025 VS 2032
- 6.2 Segment Introduction by Input Voltage
 - 6.2.1 5V
 - 6.2.2 12V
 - 6.2.3 24V
 - 6.2.4 48V
 - 6.2.5 Others
- 6.3 Market Segment by Input Voltage
 - 6.3.1 World Cooling Fan Production by Input Voltage (2021-2032)
 - 6.3.2 World Cooling Fan Production Value by Input Voltage (2021-2032)
 - 6.3.3 World Cooling Fan Average Price by Input Voltage (2021-2032)

7 MARKET ANALYSIS BY SALES CHANNEL

7.1 World Cooling Fan Market Size Overview by Sales Channel: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Sales Channel

7.2.1 Direct Sales

7.2.2 Distribution

7.3 Market Segment by Sales Channel

7.3.1 World Cooling Fan Production by Sales Channel (2021-2032)

7.3.2 World Cooling Fan Production Value by Sales Channel (2021-2032)

7.3.3 World Cooling Fan Average Price by Sales Channel (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Cooling Fan Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Ventilation

8.2.2 Agriculture

8.2.3 Mining

8.2.4 Automobile

8.2.5 Server

8.2.6 Telecom

8.2.7 Home Appliance

8.2.8 Computer and Office Equipment

8.2.9 Others

8.3 Market Segment by Application

8.3.1 World Cooling Fan Production by Application (2021-2032)

8.3.2 World Cooling Fan Production Value by Application (2021-2032)

8.3.3 World Cooling Fan Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Ebm-papst

9.1.1 Ebm-papst Details

9.1.2 Ebm-papst Major Business

9.1.3 Ebm-papst Cooling Fan Product and Services

9.1.4 Ebm-papst Cooling Fan Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Ebm-papst Recent Developments/Updates

9.1.6 Ebm-papst Competitive Strengths & Weaknesses

9.2 ZIEHL Abegg

9.2.1 ZIEHL Abegg Details

9.2.2 ZIEHL Abegg Major Business

9.2.3 ZIEHL Abegg Cooling Fan Product and Services

9.2.4 ZIEHL Abegg Cooling Fan Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 ZIEHL Abegg Recent Developments/Updates

9.2.6 ZIEHL Abegg Competitive Strengths & Weaknesses

9.3 Delta Group

9.3.1 Delta Group Details

9.3.2 Delta Group Major Business

9.3.3 Delta Group Cooling Fan Product and Services

9.3.4 Delta Group Cooling Fan Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Delta Group Recent Developments/Updates

9.3.6 Delta Group Competitive Strengths & Weaknesses

9.4 AVC

9.4.1 AVC Details

9.4.2 AVC Major Business

9.4.3 AVC Cooling Fan Product and Services

9.4.4 AVC Cooling Fan Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 AVC Recent Developments/Updates

9.4.6 AVC Competitive Strengths & Weaknesses

9.5 SUNON

9.5.1 SUNON Details

9.5.2 SUNON Major Business

9.5.3 SUNON Cooling Fan Product and Services

9.5.4 SUNON Cooling Fan Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 SUNON Recent Developments/Updates

9.5.6 SUNON Competitive Strengths & Weaknesses

9.6 NMB

9.6.1 NMB Details

9.6.2 NMB Major Business

9.6.3 NMB Cooling Fan Product and Services

9.6.4 NMB Cooling Fan Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 NMB Recent Developments/Updates

9.6.6 NMB Competitive Strengths & Weaknesses

9.7 DENSO

9.7.1 DENSO Details

9.7.2 DENSO Major Business

9.7.3 DENSO Cooling Fan Product and Services

9.7.4 DENSO Cooling Fan Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 DENSO Recent Developments/Updates

9.7.6 DENSO Competitive Strengths & Weaknesses

9.8 SANYO DENKI

9.8.1 SANYO DENKI Details

9.8.2 SANYO DENKI Major Business

9.8.3 SANYO DENKI Cooling Fan Product and Services

9.8.4 SANYO DENKI Cooling Fan Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 SANYO DENKI Recent Developments/Updates

9.8.6 SANYO DENKI Competitive Strengths & Weaknesses

9.9 SPAL Automotive

9.9.1 SPAL Automotive Details

9.9.2 SPAL Automotive Major Business

9.9.3 SPAL Automotive Cooling Fan Product and Services

9.9.4 SPAL Automotive Cooling Fan Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 SPAL Automotive Recent Developments/Updates

9.9.6 SPAL Automotive Competitive Strengths & Weaknesses

9.10 Nidec Corporation

9.10.1 Nidec Corporation Details

9.10.2 Nidec Corporation Major Business

9.10.3 Nidec Corporation Cooling Fan Product and Services

9.10.4 Nidec Corporation Cooling Fan Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 Nidec Corporation Recent Developments/Updates

9.10.6 Nidec Corporation Competitive Strengths & Weaknesses

9.11 Rosenberg

9.11.1 Rosenberg Details

9.11.2 Rosenberg Major Business

9.11.3 Rosenberg Cooling Fan Product and Services

9.11.4 Rosenberg Cooling Fan Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.11.5 Rosenberg Recent Developments/Updates
- 9.11.6 Rosenberg Competitive Strengths & Weaknesses
- 9.12 Aerovent
 - 9.12.1 Aerovent Details
 - 9.12.2 Aerovent Major Business
 - 9.12.3 Aerovent Cooling Fan Product and Services
 - 9.12.4 Aerovent Cooling Fan Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Aerovent Recent Developments/Updates
 - 9.12.6 Aerovent Competitive Strengths & Weaknesses
- 9.13 Horton
 - 9.13.1 Horton Details
 - 9.13.2 Horton Major Business
 - 9.13.3 Horton Cooling Fan Product and Services
 - 9.13.4 Horton Cooling Fan Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Horton Recent Developments/Updates
 - 9.13.6 Horton Competitive Strengths & Weaknesses
- 9.14 Multi-Wing
 - 9.14.1 Multi-Wing Details
 - 9.14.2 Multi-Wing Major Business
 - 9.14.3 Multi-Wing Cooling Fan Product and Services
 - 9.14.4 Multi-Wing Cooling Fan Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Multi-Wing Recent Developments/Updates
 - 9.14.6 Multi-Wing Competitive Strengths & Weaknesses
- 9.15 Guangdong Shenghui Technology
 - 9.15.1 Guangdong Shenghui Technology Details
 - 9.15.2 Guangdong Shenghui Technology Major Business
 - 9.15.3 Guangdong Shenghui Technology Cooling Fan Product and Services
 - 9.15.4 Guangdong Shenghui Technology Cooling Fan Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 Guangdong Shenghui Technology Recent Developments/Updates
 - 9.15.6 Guangdong Shenghui Technology Competitive Strengths & Weaknesses
- 9.16 AMETEK.Inc
 - 9.16.1 AMETEK.Inc Details
 - 9.16.2 AMETEK.Inc Major Business
 - 9.16.3 AMETEK.Inc Cooling Fan Product and Services
 - 9.16.4 AMETEK.Inc Cooling Fan Production, Price, Value, Gross Margin and Market

Share (2021-2026)

9.16.5 AMETEK.Inc Recent Developments/Updates

9.16.6 AMETEK.Inc Competitive Strengths & Weaknesses

9.17 ADDA

9.17.1 ADDA Details

9.17.2 ADDA Major Business

9.17.3 ADDA Cooling Fan Product and Services

9.17.4 ADDA Cooling Fan Production, Price, Value, Gross Margin and Market Share

(2021-2026)

9.17.5 ADDA Recent Developments/Updates

9.17.6 ADDA Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Cooling Fan Industry Chain

10.2 Cooling Fan Upstream Analysis

10.2.1 Cooling Fan Core Raw Materials

10.2.2 Main Manufacturers of Cooling Fan Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Cooling Fan Production Mode

10.6 Cooling Fan Procurement Model

10.7 Cooling Fan Industry Sales Model and Sales Channels

10.7.1 Cooling Fan Sales Model

10.7.2 Cooling Fan Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. World Cooling Fan Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World Cooling Fan Production Value by Region (2021-2026) & (USD Million)
- Table 3. World Cooling Fan Production Value by Region (2027-2032) & (USD Million)
- Table 4. World Cooling Fan Production Value Market Share by Region (2021-2026)
- Table 5. World Cooling Fan Production Value Market Share by Region (2027-2032)
- Table 6. World Cooling Fan Production by Region (2021-2026) & (Million Units)
- Table 7. World Cooling Fan Production by Region (2027-2032) & (Million Units)
- Table 8. World Cooling Fan Production Market Share by Region (2021-2026)
- Table 9. World Cooling Fan Production Market Share by Region (2027-2032)
- Table 10. World Cooling Fan Average Price by Region (2021-2026) & (US\$/Unit)
- Table 11. World Cooling Fan Average Price by Region (2027-2032) & (US\$/Unit)
- Table 12. Cooling Fan Major Market Trends
- Table 13. World Cooling Fan Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Million Units)
- Table 14. World Cooling Fan Consumption by Region (2021-2026) & (Million Units)
- Table 15. World Cooling Fan Consumption Forecast by Region (2027-2032) & (Million Units)
- Table 16. World Cooling Fan Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key Cooling Fan Producers in 2025
- Table 18. World Cooling Fan Production by Manufacturer (2021-2026) & (Million Units)
- Table 19. Production Market Share of Key Cooling Fan Producers in 2025
- Table 20. World Cooling Fan Average Price by Manufacturer (2021-2026) & (US\$/Unit)
- Table 21. Global Cooling Fan Company Evaluation Quadrant
- Table 22. World Cooling Fan Industry Rank of Major Manufacturers, Based on Production Value in 2025
- Table 23. Head Office and Cooling Fan Production Site of Key Manufacturer
- Table 24. Cooling Fan Market: Company Product Type Footprint
- Table 25. Cooling Fan Market: Company Product Application Footprint
- Table 26. Cooling Fan Competitive Factors
- Table 27. Cooling Fan New Entrant and Capacity Expansion Plans
- Table 28. Cooling Fan Mergers & Acquisitions Activity
- Table 29. United States VS China Cooling Fan Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Cooling Fan Production Comparison, (2021 & 2025 & 2032) & (Million Units)

Table 31. United States VS China Cooling Fan Consumption Comparison, (2021 & 2025 & 2032) & (Million Units)

Table 32. United States Based Cooling Fan Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Cooling Fan Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Cooling Fan Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Cooling Fan Production (2021-2026) & (Million Units)

Table 36. United States Based Manufacturers Cooling Fan Production Market Share (2021-2026)

Table 37. China Based Cooling Fan Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Cooling Fan Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Cooling Fan Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Cooling Fan Production, (2021-2026) & (Million Units)

Table 41. China Based Manufacturers Cooling Fan Production Market Share (2021-2026)

Table 42. Rest of World Based Cooling Fan Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Cooling Fan Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Cooling Fan Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Cooling Fan Production, (2021-2026) & (Million Units)

Table 46. Rest of World Based Manufacturers Cooling Fan Production Market Share (2021-2026)

Table 47. World Cooling Fan Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Cooling Fan Production by Type (2021-2026) & (Million Units)

Table 49. World Cooling Fan Production by Type (2027-2032) & (Million Units)

Table 50. World Cooling Fan Production Value by Type (2021-2026) & (USD Million)

Table 51. World Cooling Fan Production Value by Type (2027-2032) & (USD Million)

Table 52. World Cooling Fan Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Cooling Fan Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Cooling Fan Production Value by Input Voltage, (USD Million), 2021 & 2025 & 2032

Table 55. World Cooling Fan Production by Input Voltage (2021-2026) & (Million Units)

Table 56. World Cooling Fan Production by Input Voltage (2027-2032) & (Million Units)

Table 57. World Cooling Fan Production Value by Input Voltage (2021-2026) & (USD Million)

Table 58. World Cooling Fan Production Value by Input Voltage (2027-2032) & (USD Million)

Table 59. World Cooling Fan Average Price by Input Voltage (2021-2026) & (US\$/Unit)

Table 60. World Cooling Fan Average Price by Input Voltage (2027-2032) & (US\$/Unit)

Table 61. World Cooling Fan Production Value by Sales Channel, (USD Million), 2021 & 2025 & 2032

Table 62. World Cooling Fan Production by Sales Channel (2021-2026) & (Million Units)

Table 63. World Cooling Fan Production by Sales Channel (2027-2032) & (Million Units)

Table 64. World Cooling Fan Production Value by Sales Channel (2021-2026) & (USD Million)

Table 65. World Cooling Fan Production Value by Sales Channel (2027-2032) & (USD Million)

Table 66. World Cooling Fan Average Price by Sales Channel (2021-2026) & (US\$/Unit)

Table 67. World Cooling Fan Average Price by Sales Channel (2027-2032) & (US\$/Unit)

Table 68. World Cooling Fan Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Cooling Fan Production by Application (2021-2026) & (Million Units)

Table 70. World Cooling Fan Production by Application (2027-2032) & (Million Units)

Table 71. World Cooling Fan Production Value by Application (2021-2026) & (USD Million)

Table 72. World Cooling Fan Production Value by Application (2027-2032) & (USD Million)

Table 73. World Cooling Fan Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Cooling Fan Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Ebm-papst Basic Information, Manufacturing Base and Competitors

Table 76. Ebm-papst Major Business

Table 77. Ebm-papst Cooling Fan Product and Services

Table 78. Ebm-papst Cooling Fan Production (Million Units), Price (US\$/Unit),

Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Ebm-papst Recent Developments/Updates

Table 80. Ebm-papst Competitive Strengths & Weaknesses

Table 81. ZIEHL Abegg Basic Information, Manufacturing Base and Competitors

Table 82. ZIEHL Abegg Major Business

Table 83. ZIEHL Abegg Cooling Fan Product and Services

Table 84. ZIEHL Abegg Cooling Fan Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. ZIEHL Abegg Recent Developments/Updates

Table 86. ZIEHL Abegg Competitive Strengths & Weaknesses

Table 87. Delta Group Basic Information, Manufacturing Base and Competitors

Table 88. Delta Group Major Business

Table 89. Delta Group Cooling Fan Product and Services

Table 90. Delta Group Cooling Fan Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Delta Group Recent Developments/Updates

Table 92. Delta Group Competitive Strengths & Weaknesses

Table 93. AVC Basic Information, Manufacturing Base and Competitors

Table 94. AVC Major Business

Table 95. AVC Cooling Fan Product and Services

Table 96. AVC Cooling Fan Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. AVC Recent Developments/Updates

Table 98. AVC Competitive Strengths & Weaknesses

Table 99. SUNON Basic Information, Manufacturing Base and Competitors

Table 100. SUNON Major Business

Table 101. SUNON Cooling Fan Product and Services

Table 102. SUNON Cooling Fan Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. SUNON Recent Developments/Updates

Table 104. SUNON Competitive Strengths & Weaknesses

Table 105. NMB Basic Information, Manufacturing Base and Competitors

Table 106. NMB Major Business

Table 107. NMB Cooling Fan Product and Services

Table 108. NMB Cooling Fan Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. NMB Recent Developments/Updates

Table 110. NMB Competitive Strengths & Weaknesses

Table 111. DENSO Basic Information, Manufacturing Base and Competitors

- Table 112. DENSO Major Business
- Table 113. DENSO Cooling Fan Product and Services
- Table 114. DENSO Cooling Fan Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 115. DENSO Recent Developments/Updates
- Table 116. DENSO Competitive Strengths & Weaknesses
- Table 117. SANYO DENKI Basic Information, Manufacturing Base and Competitors
- Table 118. SANYO DENKI Major Business
- Table 119. SANYO DENKI Cooling Fan Product and Services
- Table 120. SANYO DENKI Cooling Fan Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 121. SANYO DENKI Recent Developments/Updates
- Table 122. SANYO DENKI Competitive Strengths & Weaknesses
- Table 123. SPAL Automotive Basic Information, Manufacturing Base and Competitors
- Table 124. SPAL Automotive Major Business
- Table 125. SPAL Automotive Cooling Fan Product and Services
- Table 126. SPAL Automotive Cooling Fan Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 127. SPAL Automotive Recent Developments/Updates
- Table 128. SPAL Automotive Competitive Strengths & Weaknesses
- Table 129. Nidec Corporation Basic Information, Manufacturing Base and Competitors
- Table 130. Nidec Corporation Major Business
- Table 131. Nidec Corporation Cooling Fan Product and Services
- Table 132. Nidec Corporation Cooling Fan Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 133. Nidec Corporation Recent Developments/Updates
- Table 134. Nidec Corporation Competitive Strengths & Weaknesses
- Table 135. Rosenberg Basic Information, Manufacturing Base and Competitors
- Table 136. Rosenberg Major Business
- Table 137. Rosenberg Cooling Fan Product and Services
- Table 138. Rosenberg Cooling Fan Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 139. Rosenberg Recent Developments/Updates
- Table 140. Rosenberg Competitive Strengths & Weaknesses
- Table 141. Aerovent Basic Information, Manufacturing Base and Competitors
- Table 142. Aerovent Major Business
- Table 143. Aerovent Cooling Fan Product and Services
- Table 144. Aerovent Cooling Fan Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

- Table 145. Aerovent Recent Developments/Updates
- Table 146. Aerovent Competitive Strengths & Weaknesses
- Table 147. Horton Basic Information, Manufacturing Base and Competitors
- Table 148. Horton Major Business
- Table 149. Horton Cooling Fan Product and Services
- Table 150. Horton Cooling Fan Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 151. Horton Recent Developments/Updates
- Table 152. Horton Competitive Strengths & Weaknesses
- Table 153. Multi-Wing Basic Information, Manufacturing Base and Competitors
- Table 154. Multi-Wing Major Business
- Table 155. Multi-Wing Cooling Fan Product and Services
- Table 156. Multi-Wing Cooling Fan Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 157. Multi-Wing Recent Developments/Updates
- Table 158. Multi-Wing Competitive Strengths & Weaknesses
- Table 159. Guangdong Shenghui Technology Basic Information, Manufacturing Base and Competitors
- Table 160. Guangdong Shenghui Technology Major Business
- Table 161. Guangdong Shenghui Technology Cooling Fan Product and Services
- Table 162. Guangdong Shenghui Technology Cooling Fan Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 163. Guangdong Shenghui Technology Recent Developments/Updates
- Table 164. Guangdong Shenghui Technology Competitive Strengths & Weaknesses
- Table 165. AMETEK.Inc Basic Information, Manufacturing Base and Competitors
- Table 166. AMETEK.Inc Major Business
- Table 167. AMETEK.Inc Cooling Fan Product and Services
- Table 168. AMETEK.Inc Cooling Fan Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 169. AMETEK.Inc Recent Developments/Updates
- Table 170. AMETEK.Inc Competitive Strengths & Weaknesses
- Table 171. ADDA Basic Information, Manufacturing Base and Competitors
- Table 172. ADDA Major Business
- Table 173. ADDA Cooling Fan Product and Services
- Table 174. ADDA Cooling Fan Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 175. ADDA Recent Developments/Updates
- Table 176. ADDA Competitive Strengths & Weaknesses

Table 177. Global Key Players of Cooling Fan Upstream (Raw Materials)

Table 178. Global Cooling Fan Typical Customers

Table 179. Cooling Fan Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Cooling Fan Picture

Figure 2. World Cooling Fan Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Cooling Fan Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Cooling Fan Production (2021-2032) & (Million Units)

Figure 5. World Cooling Fan Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Cooling Fan Production Value Market Share by Region (2021-2032)

Figure 7. World Cooling Fan Production Market Share by Region (2021-2032)

Figure 8. North America Cooling Fan Production (2021-2032) & (Million Units)

Figure 9. Europe Cooling Fan Production (2021-2032) & (Million Units)

Figure 10. China Cooling Fan Production (2021-2032) & (Million Units)

Figure 11. Japan Cooling Fan Production (2021-2032) & (Million Units)

Figure 12. Cooling Fan Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Cooling Fan Consumption (2021-2032) & (Million Units)

Figure 15. World Cooling Fan Consumption Market Share by Region (2021-2032)

Figure 16. United States Cooling Fan Consumption (2021-2032) & (Million Units)

Figure 17. China Cooling Fan Consumption (2021-2032) & (Million Units)

Figure 18. Europe Cooling Fan Consumption (2021-2032) & (Million Units)

Figure 19. Japan Cooling Fan Consumption (2021-2032) & (Million Units)

Figure 20. South Korea Cooling Fan Consumption (2021-2032) & (Million Units)

Figure 21. ASEAN Cooling Fan Consumption (2021-2032) & (Million Units)

Figure 22. India Cooling Fan Consumption (2021-2032) & (Million Units)

Figure 23. Producer Shipments of Cooling Fan by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Cooling Fan Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Cooling Fan Markets in 2025

Figure 26. United States VS China: Cooling Fan Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Cooling Fan Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Cooling Fan Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Cooling Fan Production Market Share 2025

Figure 30. China Based Manufacturers Cooling Fan Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Cooling Fan Production Market Share 2025

Figure 32. World Cooling Fan Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Cooling Fan Production Value Market Share by Type in 2025

Figure 34. Axial Fans

Figure 35. Centrifugal Fans

Figure 36. Others

Figure 37. World Cooling Fan Production Market Share by Type (2021-2032)

Figure 38. World Cooling Fan Production Value Market Share by Type (2021-2032)

Figure 39. World Cooling Fan Average Price by Type (2021-2032) & (US\$/Unit)

Figure 40. World Cooling Fan Production Value by Input Voltage, (USD Million), 2021 & 2025 & 2032

Figure 41. World Cooling Fan Production Value Market Share by Input Voltage in 2025

Figure 42. 5V

Figure 43. 12V

Figure 44. 24V

Figure 45. 48V

Figure 46. Others

Figure 47. World Cooling Fan Production Market Share by Input Voltage (2021-2032)

Figure 48. World Cooling Fan Production Value Market Share by Input Voltage (2021-2032)

Figure 49. World Cooling Fan Average Price by Input Voltage (2021-2032) & (US\$/Unit)

Figure 50. World Cooling Fan Production Value by Sales Channel, (USD Million), 2021 & 2025 & 2032

Figure 51. World Cooling Fan Production Value Market Share by Sales Channel in 2025

Figure 52. Direct Sales

Figure 53. Distribution

Figure 54. World Cooling Fan Production Market Share by Sales Channel (2021-2032)

Figure 55. World Cooling Fan Production Value Market Share by Sales Channel (2021-2032)

Figure 56. World Cooling Fan Average Price by Sales Channel (2021-2032) & (US\$/Unit)

Figure 57. World Cooling Fan Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 58. World Cooling Fan Production Value Market Share by Application in 2025

Figure 59. Ventilation

Figure 60. Agriculture

Figure 61. Mining

Figure 62. Automobile

Figure 63. Server

Figure 64. Telecom

Figure 65. Home Appliance

Figure 66. Computer and Office Equipment

Figure 67. Computer and Office Equipment

Figure 68. World Cooling Fan Production Market Share by Application (2021-2032)

Figure 69. World Cooling Fan Production Value Market Share by Application (2021-2032)

Figure 70. World Cooling Fan Average Price by Application (2021-2032) & (US\$/Unit)

Figure 71. Cooling Fan Industry Chain

Figure 72. Cooling Fan Procurement Model

Figure 73. Cooling Fan Sales Model

Figure 74. Cooling Fan Sales Channels, Direct Sales, and Distribution

Figure 75. Methodology

Figure 76. Research Process and Data Source

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