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Global Data Center Cooling Optimization Software Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Data Center Cooling Optimization Software market size is expected to reach $ 1684 million by 2032, rising at a market growth of 17.2% CAGR during the forecast period (2026-2032).

Data Center Cooling Optimization Software refers to specialized software platforms and optimization modules used to improve the thermal performance, cooling efficiency and operating stability of data centers. The software typically collects and analyzes IT load, rack temperature, humidity, differential pressure, airflow, chilled-water and cooling-water temperatures, coolant flow, equipment power consumption and operating data from chillers, cooling towers, pumps, CRAC/CRAH units, fan walls and coolant distribution units. Using rule-based optimization, mathematical models, machine learning, reinforcement learning, model predictive control, computational fluid dynamics or physics-based digital twins, these solutions generate recommendations or automatically adjust cooling capacity, equipment sequencing, fan and pump speeds, supply-water temperatures, airflow distribution and cooling setpoints. The market primarily covers standalone AI cooling optimization platforms, supervisory and closed-loop control software, thermal digital twins, chiller-plant optimization software, white-space cooling optimization modules and dedicated cooling optimization functions embedded within DCIM, BMS, EMS or cooling-control environments. Commercial applications span hyperscale and AI data centers, colocation facilities, enterprise data centers, telecom facilities and other mission-critical computing environments.

Key Findings

The confirmed market structure contains 22 core suppliers, 16 extended

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suppliers and 13 additional companies under verification

North America and Europe host the densest clusters of specialized AI cooling optimization and digital-twin software suppliers

China features a comparatively strong integrated model combining cooling equipment, energy management, DCIM and optimization software

Supervisory optimization and thermal analytics form the established commercial base, while autonomous control and liquid-cooling optimization are emerging rapidly

Competition spans pure-play AI software, digital twins, DCIM platforms, industrial automation groups and cooling equipment manufacturers

Market Trends

Data Center Cooling Optimization Software is moving from monitoring and advisory analytics toward active supervisory optimization and bounded autonomous control. Traditional software mainly visualized temperatures, airflow and cooling utilization, whereas newer platforms increasingly connect IT load, thermal conditions and cooling infrastructure in a continuous feedback loop, dynamically adjusting cooling capacity and operating setpoints according to changing workloads. Schneider Electric and Siemens already commercialize software that actively optimizes cooling rather than merely displaying facility conditions, while physics-based digital twins are increasingly being used to evaluate cooling, capacity and failure scenarios during both design and operation. AI and HPC are accelerating this transition because rapidly changing GPU loads create more dynamic thermal conditions than conventional enterprise workloads. ASHRAE's 2026 AI data center framework highlights the rise of rack densities from around 120 kW toward several hundred kilowatts, increasing the need to coordinate air cooling, chilled-water infrastructure and liquid-cooling loops. The longer-term product direction is therefore toward hybrid physics-plus-AI models, real-time digital twins, workload-aware cooling, liquid-cooling optimization and safer closed-loop control with operating constraints and fallback mechanisms.

Market Dynamics

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Drivers

The principal growth driver is the increasing thermal and power intensity of data center infrastructure. The IEA estimates that global data center electricity consumption increased strongly in 2025 and could rise from about 485 TWh in 2025 to approximately 950 TWh by 2030, while electricity consumption from AI-focused data centers grows substantially faster. This expansion raises the economic value of optimizing existing cooling capacity rather than relying only on additional physical infrastructure. Higher rack density, variable GPU workloads, tighter power availability and the transition toward mixed air-and-liquid cooling architectures are also increasing the number of operating variables that facility teams must coordinate. At the policy level, energy-performance reporting requirements for data centers in the European Union and U.S. programs supporting advanced cooling technologies are strengthening demand for measurable improvements in energy and thermal performance.

Restraints

Market adoption remains constrained by integration complexity, operational risk and the fragmented control architecture of existing data centers. Optimization software must connect reliably with different generations and brands of BMS, DCIM, PLC, CRAC/CRAH, chillers, pumps, sensors and increasingly CDUs, while maintaining redundancy and thermal safety. Many operators are willing to use analytics and recommended setpoints but remain more cautious about allowing third-party software to write directly into mission-critical control systems. The commercial model can also be difficult to standardize because products are licensed by site, rack, capacity, software module or subscription and are frequently bundled with engineering, controls or cooling equipment. These factors extend validation cycles, complicate software-only revenue attribution and favor suppliers that can demonstrate stable operation across heterogeneous facilities.

Opportunities

The most attractive opportunities are emerging around AI factories, high-density GPU clusters, retrofit optimization and hybrid air-liquid cooling. As rack densities rise, optimization value is shifting from simple energy savings toward capacity release, thermal-risk reduction and more effective utilization of constrained power and cooling infrastructure. Liquid cooling creates an additional software layer around CDU operation, coolant temperature, flow control, heat rejection and coordination with

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residual air cooling, while digital twins can increasingly bridge design, commissioning and live operations. Suppliers capable of operating above existing BMS and equipment controls without requiring wholesale hardware replacement have an opportunity to penetrate brownfield colocation and enterprise facilities. Policy-driven efficiency reporting and increasingly transparent sustainability metrics in Europe may also create additional demand for software that can continuously measure, explain and optimize cooling performance.

Challenges

The main long-term challenge is proving optimization performance without compromising data center availability. Cooling control algorithms must respond to rapidly changing workloads while respecting equipment limitations, redundancy requirements and site-specific operating rules, making deployment considerably more demanding than generic building HVAC optimization. Cybersecurity, data sovereignty and customer requirements for on-premises or air-gapped operation can further raise implementation costs. Another structural challenge is platform bundling: capabilities that are currently sold by independent AI optimization vendors may increasingly be incorporated into DCIM, BMS, liquid-cooling controls and cooling OEM software stacks. As a result, independent suppliers will need to demonstrate equipment-agnostic integration, measurable energy or capacity benefits, robust fallback logic and clear lifecycle economics rather than relying on AI functionality alone.

Value Chain Analysis

The upstream layer of the Data Center Cooling Optimization Software value chain consists primarily of operational data and enabling technologies rather than conventional physical raw materials. Key inputs include temperature, humidity, pressure, flow and power sensors; BMS, PLC, DCIM and equipment-control interfaces; IT workload and rack telemetry; cloud and edge computing infrastructure; CFD and digital-twin engines; AI/ML frameworks; and domain knowledge covering refrigeration, hydronics, airflow and facility control. The quality, granularity and latency of these inputs directly affect optimization accuracy. As liquid cooling expands, data from CDUs, coolant loops, pumps and heat-rejection systems is becoming increasingly important, widening the software integration boundary from white-space cooling toward the complete thermal chain.

The midstream value is created by software vendors that transform facility data into

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thermal models, predictions, recommended setpoints or executable control decisions. Value generally increases as the product moves from visualization to predictive analytics, supervisory optimization and validated closed-loop control because the software becomes more directly linked to energy savings, capacity utilization and reliability. Downstream customers include hyperscale operators, colocation providers, enterprise data centers, telecom operators and other mission-critical facilities. Pure software companies tend to have relatively asset-light cost structures but face substantial R&D, integration and customer-validation expenses, while cooling and automation OEMs can leverage installed equipment, service networks and native control interfaces. This difference explains why the market supports both specialist software vendors and large infrastructure groups.

Segment Insights

By primary optimization function, advisory analytics and supervisory setpoint optimization currently represent the broadest established commercial base because they can improve cooling efficiency while preserving the customer's existing BMS and equipment-level control architecture. Closed-loop autonomous control is a smaller but strategically important direction, particularly for facilities with dense instrumentation, standardized controls and rapidly changing AI workloads. Schneider Electric's Cooling Optimize uses active cooling control, while Siemens combines sensors, cooling controls and an AI engine to match cooling with IT load, demonstrating the transition from passive monitoring toward operational optimization. Thermal digital twins form another important segment, with applications extending from new data center design and capacity planning to retrofit evaluation and operating optimization. Cadence's data center digital-twin portfolio illustrates how physics-based simulation can model design configurations, cooling performance and failure scenarios before changes are implemented physically.

By cooling domain, white-space air cooling and central chilled-water plant optimization remain the most mature commercial applications, while liquid-cooling loop and hybrid whole-system optimization offer stronger incremental technology opportunities. The shift toward high-density AI computing increasingly requires software to coordinate air-side thermal conditions, water-side equipment and CDU-level liquid systems rather than optimize each subsystem independently. From a deployment perspective, on-premises or hybrid architectures remain important for mission-critical customers because real-time control, cybersecurity and resilience requirements often favor local execution, while cloud platforms remain valuable for model training, fleet analytics and multi-site

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benchmarking.

Downstream Market Opportunities

Hyperscale and AI infrastructure represent the most technically demanding opportunity because fast-changing GPU workloads, high rack densities and constrained utility capacity increase the economic cost of both insufficient and excessive cooling. Colocation facilities constitute another attractive customer group because heterogeneous tenant loads and frequent capacity changes create persistent demand for thermal visibility, capacity planning and cooling optimization. Enterprise and telecom data centers provide a substantial retrofit opportunity, particularly where legacy cooling equipment remains serviceable but control strategies are conservative or fragmented. Across these customer groups, the purchasing rationale is increasingly shifting from energy savings alone toward a broader combination of power-capacity release, avoidance of thermal hot spots, higher usable rack density, reduced manual tuning and improved resilience under rapidly changing workloads. ASHRAE's AI data center framework reinforces the importance of integrated thermal design and operation as facility densities increase.

Regional Insights

North America and Europe currently have the deepest concentration of specialized Data Center Cooling Optimization Software suppliers in the confirmed vendor pool. North America is particularly active in autonomous AI control, reinforcement-learning-oriented optimization and software-led approaches, supported by a large hyperscale and AI infrastructure base. Europe has a diversified supplier structure spanning AI optimization, chiller-plant control, thermal digital twins and industrial automation, while regulatory emphasis on data center energy-performance reporting and sustainability rating is adding another commercial driver for measurable optimization technologies. The European Commission has already established energy-performance reporting requirements and is developing a broader rating and minimum-performance framework for data centers.

China represents a distinct competitive model in which cooling optimization software is more frequently embedded within data center infrastructure, precision cooling, energy-management or DCIM solutions rather than sold solely as independent SaaS. This supports strong local delivery and equipment integration but makes software-only

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market measurement more complex. Japan is entering a more active development phase as HVAC, electronics and IT groups explore AI-driven thermal management, while South Korea and India currently show a greater proportion of integrated infrastructure and service-oriented participants than confirmed cooling-optimization pure plays. Southeast Asia, led by Singapore, is developing a smaller but notable ecosystem around AI operations and digital twins as regional data center capacity expands.

Competitive Landscape Analysis

The competitive landscape is fragmented and technology-diverse rather than dominated by a single software category. The confirmed core pool contains 22 suppliers, supplemented by 16 extended suppliers whose cooling optimization activities are more tightly integrated with DCIM, building controls, energy management or cooling hardware, plus 13 additional companies retained for further verification. Large infrastructure and automation groups compete through installed equipment bases, native control interfaces, global service organizations and their ability to bundle software with broader data center projects. Pure-play AI suppliers compete on equipment independence, algorithmic optimization, deployment speed and the ability to generate measurable operational benefits without requiring wholesale replacement of existing cooling infrastructure. Digital-twin specialists differentiate through physics-based modeling and scenario analysis, particularly where customers need to understand airflow, thermal capacity and failure behavior before physical changes are made. Strategic consolidation is reinforcing convergence between these models: Cadence acquired Future Facilities to expand physics-based data center digital-twin capabilities, while Vertiv acquired Waylay to strengthen AI-based monitoring, predictive services and infrastructure optimization. The next phase of competition is therefore likely to focus less on whether a vendor can provide AI analytics and more on whether it can safely integrate across heterogeneous equipment, optimize both air and liquid cooling, operate under mission-critical constraints, and convert optimization into demonstrable energy, capacity and reliability improvements.

Report Scope

This report studies the global Data Center Cooling Optimization Software demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Data

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Center Cooling Optimization Software, 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 Data Center Cooling Optimization Software that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Data Center Cooling Optimization Software total market, 2021-2032, (USD Million)

Global Data Center Cooling Optimization Software total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Data Center Cooling Optimization Software total market, key domestic companies, and share, (USD Million)

Global Data Center Cooling Optimization Software revenue by player, revenue and market share 2021-2026, (USD Million)

Global Data Center Cooling Optimization Software total market by Type, CAGR, 2021-2032, (USD Million)

Global Data Center Cooling Optimization Software total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Data Center Cooling Optimization Software market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Schneider Electric SE, Siemens AG, Huawei Investment & Holding Co., Ltd., Vigilent Corporation, Carrier Global Corporation, Phaidra Inc., Cadence Design Systems, Inc., EkkoSense Ltd, etalytics GmbH, STULZ GmbH, etc.

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

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Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Data Center Cooling Optimization Software market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, 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 Data Center Cooling Optimization Software Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Data Center Cooling Optimization Software Market, Segmentation by Type:

Advisory and Analytics Optimization

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Supervisory Setpoint Optimization

Closed-loop Autonomous Control

Thermal Digital Twin and Simulation

Others

Global Data Center Cooling Optimization Software Market, Segmentation by Primary Cooling Domain:

White-space Air Cooling

Central Chilled-water Plant

Liquid Cooling Loop & CDU

Whole-system Cooling

Others

Global Data Center Cooling Optimization Software Market, Segmentation by Deployment Model:

Cloud-based

On-premise

Global Data Center Cooling Optimization Software Market, Segmentation by Application:

Internet and Cloud Computing Industry

Finance and Banking

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Government and Public Computing Power

Others

Companies Profiled:

Schneider Electric SE

Siemens AG

Huawei Investment & Holding Co., Ltd.

Vigilent Corporation

Carrier Global Corporation

Phaidra Inc.

Cadence Design Systems, Inc.

EkkoSense Ltd

etalytics GmbH

STULZ GmbH

Modine Manufacturing Company

Trane Technologies plc

Vertiv Holdings Co

Optimum Energy LLC

ZTE Corporation

Mitsubishi Electric Corporation

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Delta Electronics, Inc.

Johnson Controls International plc

Modius, Inc.

Sunbird Software, Inc.

Gamma Technologies, LLC

Red Dot AI Pte Ltd

FNT GmbH

Shenzhen Envicool Technology Co., Ltd.

Lucend

ZutaCore, Inc.

OctaiPipe

FLUIX Inc.

Zhuhai Pilot Technology Co., Ltd.

Nanjing Canatal Data-Centre Environmental Tech Co., Ltd.

Beijing Jiamu Kerui Technology Co., Ltd.

Key Questions Answered

1. How big is the global Data Center Cooling Optimization Software market?
2. What is the demand of the global Data Center Cooling Optimization Software market?
3. What is the year over year growth of the global Data Center Cooling Optimization Software market?

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4. What is the total value of the global Data Center Cooling Optimization Software market?
5. Who are the Major Players in the global Data Center Cooling Optimization Software market?
6. What are the growth factors driving the market demand?

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