

Global Data Center Thermal Management Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Data Center Thermal Management market size is expected to reach \$ 24714 million by 2032, rising at a market growth of 12.7% CAGR during the forecast period (2026-2032).

Data center thermal management refers to the process of effectively controlling and managing the heat generated during the operation of equipment within the data center, aiming to ensure the stable operation of the data center and the long-term reliability of the equipment. Since a large number of servers, storage devices and network equipment are integrated in the data center, these devices will generate a large amount of heat during operation. If the heat cannot be dissipated in a timely and effective manner, it may lead to a decrease in equipment performance, an increase in failure rate, and even a fire. and other security issues.

1. Rapid growth in data center capacity driven by cloud computing, AI, and high-performance workloads.

The accelerating adoption of cloud services, hyperscale computing, artificial intelligence (AI), machine learning (ML), and high-performance computing (HPC) is significantly increasing server density and rack power levels within data centers. Modern AI training clusters and GPU-based workloads often exceed 30–50 kW per rack, far above traditional enterprise data center designs. This rapid rise in heat density creates a critical need for advanced thermal management solutions, including precision air conditioning, liquid cooling, rear-door heat exchangers, and direct-to-chip cooling systems. As data centers scale both in size and computing intensity, effective thermal management becomes essential to maintain system reliability, reduce hardware failure rates, and ensure uninterrupted operations, directly driving demand across the data center thermal management market.

2. Increasing energy efficiency requirements and pressure to reduce operating costs and carbon emissions.

Energy consumption related to cooling represents a substantial portion of total data center operating expenses, often accounting for 30–40% of overall power usage. Governments, regulators, and enterprise customers are placing growing emphasis on energy efficiency metrics such as Power Usage Effectiveness (PUE), carbon footprint reduction, and sustainability compliance. As a result, data center operators are investing in more efficient thermal management technologies, including free cooling, evaporative cooling, liquid immersion cooling, and AI-driven cooling optimization systems. These solutions help reduce electricity consumption, improve cooling efficiency, and support corporate net-zero and ESG targets, making energy-efficient thermal management a key market driver across hyperscale, colocation, and enterprise data centers.

3. Expansion of edge data centers and geographic diversification into high-temperature regions.

The global expansion of edge computing infrastructure and the construction of data centers in emerging markets and warmer climates are further accelerating demand for advanced thermal management solutions. Edge data centers are often deployed in compact spaces with limited airflow and higher ambient temperatures, creating unique cooling challenges compared to traditional centralized facilities. Additionally, rapid data center investments in regions such as Southeast Asia, the Middle East, India, and parts of Latin America require cooling systems capable of operating efficiently under extreme environmental conditions. These factors are driving the adoption of modular cooling units, liquid-based systems, and customized thermal management architectures designed for harsh or space-constrained environments, reinforcing long-term growth in the data center thermal management market.

This report studies the global Data Center Thermal Management demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Data Center Thermal Management, 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 Thermal Management that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Data Center Thermal Management total market, 2021-2032, (USD Million)

Global Data Center Thermal Management total market by region & country, CAGR, 2021-2032, (USD Million)

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

Global Data Center Thermal Management revenue by player, revenue and market share 2021-2026, (USD Million)

Global Data Center Thermal Management total market by Type, CAGR, 2021-2032, (USD Million)

Global Data Center Thermal Management total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Data Center Thermal Management 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 Vertiv, Stulz, Schneider Electric, Rittal, Envicool, Johnson Controls, Mitsubishi Electric, Trane, Carrier, Shenling, 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 Data Center Thermal Management 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 Thermal Management Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Data Center Thermal Management Market, Segmentation by Type:

Liquid Cooling

Air Cooling

Global Data Center Thermal Management Market, Segmentation by Equipment:

Precision Air Conditioning System

Coolant Distribution Unit

Air Handling Unit

Other

Global Data Center Thermal Management Market, Segmentation by Power:

High Power

Low Power

Global Data Center Thermal Management Market, Segmentation by Application:

Small and Medium-Sized Data Center

Large Data Center

Hyper-Large Data Center

Companies Profiled:

Vertiv

Stulz

Schneider Electric

Rittal

Envicool

Johnson Controls

Mitsubishi Electric

Trane

Carrier

Shenling

YMK

Huawei

Boyd

Canatal

iTeaq

Airsys

Hairf

Key Questions Answered

1. How big is the global Data Center Thermal Management market?
2. What is the demand of the global Data Center Thermal Management market?
3. What is the year over year growth of the global Data Center Thermal Management market?
4. What is the total value of the global Data Center Thermal Management market?
5. Who are the Major Players in the global Data Center Thermal Management market?
6. What are the growth factors driving the market demand?

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