

# Global Dry Cooler for Data Center Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Dry Cooler for Data Center market size is expected to reach \$ 6347 million by 2032, rising at a market growth of 11.6% CAGR during the forecast period (2026-2032).

A dry cooler for data centers is an air-cooled heat exchange device utilized within data center cooling systems for heat dissipation. Typically, it comprises finned-tube heat exchangers, low-noise fans, a structural framework, spray or adiabatic pre-cooling modules, a control system, and anti-freeze protection components. Its primary function is to expel heat generated by server operations—circulating through chilled water, glycol solutions, or liquid cooling loops—into the outdoor environment. Furthermore, under suitable climatic conditions, it serves to reduce the operating duration of compressor-based refrigeration systems, thereby enhancing the energy efficiency of the data center. Based on global estimates, the sales volume of data center dry coolers is projected to reach approximately 69,000 units in 2025, with an average unit price of approximately \$42,800. The industry's average capacity utilization rate is estimated at around 76%. Upstream enterprises in this sector primarily specialize in copper tubing, aluminum fins, galvanized steel sheets, stainless steel frameworks, axial fans, electric motors, variable frequency drives (VFDs), controllers, valves, water pumps, sensors, and anti-corrosion coatings. Downstream enterprises mainly operate within the fields of cloud computing data centers, internet data centers, financial data centers, telecommunications operator data centers, AI computing centers, enterprise-owned server rooms, and liquid cooling system integration. The industry's average gross profit margin stands at approximately 29%. Regarding the product cost structure, the heat exchanger core accounts for approximately 32%; fans, motors, and variable frequency control components account for about 18%; the steel framework and enclosure account for roughly 14%; control systems, valves, and sensors account for about 9%; pre-cooling and anti-freeze

components account for about 8%; manufacturing labor costs account for about 7%; transportation, installation, and testing account for about 6%; and R&D, certification, and quality management account for about 6%. Downstream demand drivers include heat dissipation requirements for AI computing centers, cooling requirements for high-density servers, external heat rejection requirements for liquid cooling systems, energy-saving retrofitting needs for chilled water systems, construction requirements for low-energy data centers, capacity expansion needs for telecommunications operator server rooms, and replacement requirements for existing server rooms. Key downstream customers include Amazon Web Services (AWS), Microsoft, Google, Meta, Equinix, Digital Realty, NTT Global Data Centers, China Mobile, China Telecom, China Unicom, Tencent Cloud, Alibaba Cloud, ByteDance, and Huawei Cloud, among others. Business opportunities primarily stem from tightening green data center policies and energy efficiency standards across various nations; the increased thermal management demands resulting from the rising power consumption of AI training and inference servers; the accelerating adoption of combined liquid cooling and dry cooler solutions; and a shift in customer priorities—moving away from a sole focus on cooling capacity toward demands for lower energy and water consumption, reduced noise levels, enhanced reliability, and optimized total lifecycle operational and maintenance costs.

Market opportunities for dry coolers in data centers are shifting from their traditional role as auxiliary equipment for standard server rooms to becoming critical heat rejection units within AI-centric data centers and liquid cooling systems. As the power density per server cabinet escalates from 10 kW or 20 kW to 60 kW—or even exceeding 100 kW—traditional cooling solutions centered on compressor-based refrigeration face mounting pressure regarding energy consumption, spatial requirements, and operational costs. Consequently, dry coolers—characterized by their relatively simple structure, lower maintenance costs, ability to leverage natural cooling sources, and compatibility with both cold-plate and immersion-based liquid cooling systems—are emerging as a preferred choice for both energy-efficiency retrofits and new construction projects in large-scale data centers. In 2025, the regions expected to witness the most rapid growth in demand include North America, Europe, China, the Middle East, and Southeast Asia. Among these, North America is driven most significantly by the construction of AI computing clusters; Europe places a greater emphasis on designs that minimize energy and water consumption; and China maintains robust procurement demand, bolstered by initiatives such as the 'Eastern Data, Western Computing' project, the development of intelligent computing centers, and the expansion of cloud resources by telecommunications operators. Industry competition will center on key factors such as heat exchange efficiency, fan energy consumption, noise control, corrosion

resistance, modular delivery capabilities, adaptability to extreme climates, and synergistic design with liquid cooling systems; manufacturers possessing prior experience in data center projects and global delivery capabilities are best positioned to secure orders from top-tier clients. Looking ahead, dry coolers will not completely displace cooling towers or chillers; however, their adoption rate is expected to rise significantly in environments featuring high-density server cabinets, water-scarce regions, cold-climate zones, and data centers prioritizing a low Power Usage Effectiveness (PUE). Given the large physical dimensions of the products, high transportation costs, and the highly customized nature of data center projects, localized manufacturing and regional service capabilities will become critical competitive differentiators. The industry is expected to demonstrate strong resilience in terms of order volume; however, pricing is likely to remain susceptible to cost fluctuations in raw materials—specifically steel, copper, and aluminum—as well as fan components.

This report studies the global Dry Cooler for Data Center production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Dry Cooler for Data Center total production and demand, 2021-2032, (K Units)

Global Dry Cooler for Data Center total production value, 2021-2032, (USD Million)

Global Dry Cooler for Data Center production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Dry Cooler for Data Center consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Dry Cooler for Data Center domestic production, consumption, key domestic manufacturers and share

Global Dry Cooler for Data Center production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Dry Cooler for Data Center production by Capacity, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Dry Cooler for Data Center production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Dry Cooler for Data Center 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 Carrier (US), TICA (CN), DCX (PL), Vertiv (US), Alfa Laval (SE), Kaltra (DE), Stefani (IT), Airedale (Modine) (GB), Trane (IE/US), Kelvion (DE), 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 Dry Cooler for Data Center market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Capacity, 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 Dry Cooler for Data Center Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### Global Dry Cooler for Data Center Market, Segmentation by Capacity:

?500KW

500-1000KW

1000-2000KW

?2000KW

### Global Dry Cooler for Data Center Market, Segmentation by Casing Material:

Stainless Steel Casing

Aluminum Casing

Other

### Global Dry Cooler for Data Center Market, Segmentation by Fin Material:

Aluminum Fins

Copper Fins

Other

### Global Dry Cooler for Data Center Market, Segmentation by Application:

Tire 3 Data Center

Tire 4 Data Center

Other

### Companies Profiled:

Carrier (US)

TICA (CN)

DCX (PL)

Vertiv (US)

Alfa Laval (SE)

Kaltra (DE)

Stefani (IT)

Airedale (Modine) (GB)

Trane (IE/US)

Kelvion (DE)

Thermofin (DE)

Piovan Group (IT)

Baltimore Aircoil Company, Inc. (US)

Guntner (DE)

Envicool (CN)

Square Technology Group (CN)

Haiwu (CN)

Guangdong Shenling Environmental Systems (CN)

Key Questions Answered:

1. How big is the global Dry Cooler for Data Center market?

2. What is the demand of the global Dry Cooler for Data Center market?
3. What is the year over year growth of the global Dry Cooler for Data Center market?
4. What is the production and production value of the global Dry Cooler for Data Center market?
5. Who are the key producers in the global Dry Cooler for Data Center market?
6. What are the growth factors driving the market demand?

## Contents

### 1 SUPPLY SUMMARY

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

### 2 DEMAND SUMMARY

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

### 3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Dry Cooler for Data Center Production Value by Manufacturer (2021-2026)
- 3.2 World Dry Cooler for Data Center Production by Manufacturer (2021-2026)

- 3.3 World Dry Cooler for Data Center Average Price by Manufacturer (2021-2026)
- 3.4 Dry Cooler for Data Center Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
  - 3.5.1 Global Dry Cooler for Data Center Industry Rank of Major Manufacturers
  - 3.5.2 Global Concentration Ratios (CR4) for Dry Cooler for Data Center in 2025
  - 3.5.3 Global Concentration Ratios (CR8) for Dry Cooler for Data Center in 2025
- 3.6 Dry Cooler for Data Center Market: Overall Company Footprint Analysis
  - 3.6.1 Dry Cooler for Data Center Market: Region Footprint
  - 3.6.2 Dry Cooler for Data Center Market: Company Product Type Footprint
  - 3.6.3 Dry Cooler for Data Center 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: Dry Cooler for Data Center Production Value Comparison
  - 4.1.1 United States VS China: Dry Cooler for Data Center Production Value Comparison (2021 & 2025 & 2032)
  - 4.1.2 United States VS China: Dry Cooler for Data Center Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Dry Cooler for Data Center Production Comparison
  - 4.2.1 United States VS China: Dry Cooler for Data Center Production Comparison (2021 & 2025 & 2032)
  - 4.2.2 United States VS China: Dry Cooler for Data Center Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Dry Cooler for Data Center Consumption Comparison
  - 4.3.1 United States VS China: Dry Cooler for Data Center Consumption Comparison (2021 & 2025 & 2032)
  - 4.3.2 United States VS China: Dry Cooler for Data Center Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Dry Cooler for Data Center Manufacturers and Market Share, 2021-2026
  - 4.4.1 United States Based Dry Cooler for Data Center Manufacturers, Headquarters and Production Site (States, Country)
  - 4.4.2 United States Based Manufacturers Dry Cooler for Data Center Production Value

(2021-2026)

4.4.3 United States Based Manufacturers Dry Cooler for Data Center Production

(2021-2026)

4.5 China Based Dry Cooler for Data Center Manufacturers and Market Share

4.5.1 China Based Dry Cooler for Data Center Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Dry Cooler for Data Center Production Value (2021-2026)

4.5.3 China Based Manufacturers Dry Cooler for Data Center Production (2021-2026)

4.6 Rest of World Based Dry Cooler for Data Center Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Dry Cooler for Data Center Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Dry Cooler for Data Center Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Dry Cooler for Data Center Production (2021-2026)

## **5 MARKET ANALYSIS BY CAPACITY**

5.1 World Dry Cooler for Data Center Market Size Overview by Capacity: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Capacity

5.2.1 ?500KW

5.2.2 500-1000KW

5.2.3 1000-2000KW

5.2.4 ?2000KW

5.3 Market Segment by Capacity

5.3.1 World Dry Cooler for Data Center Production by Capacity (2021-2032)

5.3.2 World Dry Cooler for Data Center Production Value by Capacity (2021-2032)

5.3.3 World Dry Cooler for Data Center Average Price by Capacity (2021-2032)

## **6 MARKET ANALYSIS BY CASING MATERIAL**

6.1 World Dry Cooler for Data Center Market Size Overview by Casing Material: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Casing Material

6.2.1 Stainless Steel Casing

6.2.2 Aluminum Casing

### 6.2.3 Other

## 6.3 Market Segment by Casing Material

### 6.3.1 World Dry Cooler for Data Center Production by Casing Material (2021-2032)

### 6.3.2 World Dry Cooler for Data Center Production Value by Casing Material (2021-2032)

### 6.3.3 World Dry Cooler for Data Center Average Price by Casing Material (2021-2032)

## 7 MARKET ANALYSIS BY FIN MATERIAL

### 7.1 World Dry Cooler for Data Center Market Size Overview by Fin Material: 2021 VS 2025 VS 2032

### 7.2 Segment Introduction by Fin Material

#### 7.2.1 Aluminum Fins

#### 7.2.2 Copper Fins

#### 7.2.3 Other

### 7.3 Market Segment by Fin Material

#### 7.3.1 World Dry Cooler for Data Center Production by Fin Material (2021-2032)

#### 7.3.2 World Dry Cooler for Data Center Production Value by Fin Material (2021-2032)

#### 7.3.3 World Dry Cooler for Data Center Average Price by Fin Material (2021-2032)

## 8 MARKET ANALYSIS BY APPLICATION

### 8.1 World Dry Cooler for Data Center Market Size Overview by Application: 2021 VS 2025 VS 2032

### 8.2 Segment Introduction by Application

#### 8.2.1 Tire 3 Data Center

#### 8.2.2 Tire 4 Data Center

#### 8.2.3 Other

### 8.3 Market Segment by Application

#### 8.3.1 World Dry Cooler for Data Center Production by Application (2021-2032)

#### 8.3.2 World Dry Cooler for Data Center Production Value by Application (2021-2032)

#### 8.3.3 World Dry Cooler for Data Center Average Price by Application (2021-2032)

## 9 COMPANY PROFILES

### 9.1 Carrier (US)

#### 9.1.1 Carrier (US) Details

#### 9.1.2 Carrier (US) Major Business

#### 9.1.3 Carrier (US) Dry Cooler for Data Center Product and Services

9.1.4 Carrier (US) Dry Cooler for Data Center Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Carrier (US) Recent Developments/Updates

9.1.6 Carrier (US) Competitive Strengths & Weaknesses

9.2 TICA (CN)

9.2.1 TICA (CN) Details

9.2.2 TICA (CN) Major Business

9.2.3 TICA (CN) Dry Cooler for Data Center Product and Services

9.2.4 TICA (CN) Dry Cooler for Data Center Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 TICA (CN) Recent Developments/Updates

9.2.6 TICA (CN) Competitive Strengths & Weaknesses

9.3 DCX (PL)

9.3.1 DCX (PL) Details

9.3.2 DCX (PL) Major Business

9.3.3 DCX (PL) Dry Cooler for Data Center Product and Services

9.3.4 DCX (PL) Dry Cooler for Data Center Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 DCX (PL) Recent Developments/Updates

9.3.6 DCX (PL) Competitive Strengths & Weaknesses

9.4 Vertiv (US)

9.4.1 Vertiv (US) Details

9.4.2 Vertiv (US) Major Business

9.4.3 Vertiv (US) Dry Cooler for Data Center Product and Services

9.4.4 Vertiv (US) Dry Cooler for Data Center Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Vertiv (US) Recent Developments/Updates

9.4.6 Vertiv (US) Competitive Strengths & Weaknesses

9.5 Alfa Laval (SE)

9.5.1 Alfa Laval (SE) Details

9.5.2 Alfa Laval (SE) Major Business

9.5.3 Alfa Laval (SE) Dry Cooler for Data Center Product and Services

9.5.4 Alfa Laval (SE) Dry Cooler for Data Center Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Alfa Laval (SE) Recent Developments/Updates

9.5.6 Alfa Laval (SE) Competitive Strengths & Weaknesses

9.6 Kaltra (DE)

9.6.1 Kaltra (DE) Details

9.6.2 Kaltra (DE) Major Business

- 9.6.3 Kaltra (DE) Dry Cooler for Data Center Product and Services
- 9.6.4 Kaltra (DE) Dry Cooler for Data Center Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.6.5 Kaltra (DE) Recent Developments/Updates
- 9.6.6 Kaltra (DE) Competitive Strengths & Weaknesses
- 9.7 Stefani (IT)
  - 9.7.1 Stefani (IT) Details
  - 9.7.2 Stefani (IT) Major Business
  - 9.7.3 Stefani (IT) Dry Cooler for Data Center Product and Services
  - 9.7.4 Stefani (IT) Dry Cooler for Data Center Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.7.5 Stefani (IT) Recent Developments/Updates
  - 9.7.6 Stefani (IT) Competitive Strengths & Weaknesses
- 9.8 Airedale (Modine) (GB)
  - 9.8.1 Airedale (Modine) (GB) Details
  - 9.8.2 Airedale (Modine) (GB) Major Business
  - 9.8.3 Airedale (Modine) (GB) Dry Cooler for Data Center Product and Services
  - 9.8.4 Airedale (Modine) (GB) Dry Cooler for Data Center Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.8.5 Airedale (Modine) (GB) Recent Developments/Updates
  - 9.8.6 Airedale (Modine) (GB) Competitive Strengths & Weaknesses
- 9.9 Trane (IE/US)
  - 9.9.1 Trane (IE/US) Details
  - 9.9.2 Trane (IE/US) Major Business
  - 9.9.3 Trane (IE/US) Dry Cooler for Data Center Product and Services
  - 9.9.4 Trane (IE/US) Dry Cooler for Data Center Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.9.5 Trane (IE/US) Recent Developments/Updates
  - 9.9.6 Trane (IE/US) Competitive Strengths & Weaknesses
- 9.10 Kelvion (DE)
  - 9.10.1 Kelvion (DE) Details
  - 9.10.2 Kelvion (DE) Major Business
  - 9.10.3 Kelvion (DE) Dry Cooler for Data Center Product and Services
  - 9.10.4 Kelvion (DE) Dry Cooler for Data Center Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.10.5 Kelvion (DE) Recent Developments/Updates
  - 9.10.6 Kelvion (DE) Competitive Strengths & Weaknesses
- 9.11 Thermofin (DE)
  - 9.11.1 Thermofin (DE) Details

- 9.11.2 Thermofin (DE) Major Business
- 9.11.3 Thermofin (DE) Dry Cooler for Data Center Product and Services
- 9.11.4 Thermofin (DE) Dry Cooler for Data Center Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.11.5 Thermofin (DE) Recent Developments/Updates
- 9.11.6 Thermofin (DE) Competitive Strengths & Weaknesses
- 9.12 Piovan Group (IT)
  - 9.12.1 Piovan Group (IT) Details
  - 9.12.2 Piovan Group (IT) Major Business
  - 9.12.3 Piovan Group (IT) Dry Cooler for Data Center Product and Services
  - 9.12.4 Piovan Group (IT) Dry Cooler for Data Center Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.12.5 Piovan Group (IT) Recent Developments/Updates
  - 9.12.6 Piovan Group (IT) Competitive Strengths & Weaknesses
- 9.13 Baltimore Aircoil Company, Inc. (US)
  - 9.13.1 Baltimore Aircoil Company, Inc. (US) Details
  - 9.13.2 Baltimore Aircoil Company, Inc. (US) Major Business
  - 9.13.3 Baltimore Aircoil Company, Inc. (US) Dry Cooler for Data Center Product and Services
  - 9.13.4 Baltimore Aircoil Company, Inc. (US) Dry Cooler for Data Center Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.13.5 Baltimore Aircoil Company, Inc. (US) Recent Developments/Updates
  - 9.13.6 Baltimore Aircoil Company, Inc. (US) Competitive Strengths & Weaknesses
- 9.14 Guntner (DE)
  - 9.14.1 Guntner (DE) Details
  - 9.14.2 Guntner (DE) Major Business
  - 9.14.3 Guntner (DE) Dry Cooler for Data Center Product and Services
  - 9.14.4 Guntner (DE) Dry Cooler for Data Center Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.14.5 Guntner (DE) Recent Developments/Updates
  - 9.14.6 Guntner (DE) Competitive Strengths & Weaknesses
- 9.15 Envicool (CN)
  - 9.15.1 Envicool (CN) Details
  - 9.15.2 Envicool (CN) Major Business
  - 9.15.3 Envicool (CN) Dry Cooler for Data Center Product and Services
  - 9.15.4 Envicool (CN) Dry Cooler for Data Center Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.15.5 Envicool (CN) Recent Developments/Updates
  - 9.15.6 Envicool (CN) Competitive Strengths & Weaknesses

## 9.16 Square Technology Group (CN)

9.16.1 Square Technology Group (CN) Details

9.16.2 Square Technology Group (CN) Major Business

9.16.3 Square Technology Group (CN) Dry Cooler for Data Center Product and Services

9.16.4 Square Technology Group (CN) Dry Cooler for Data Center Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.16.5 Square Technology Group (CN) Recent Developments/Updates

9.16.6 Square Technology Group (CN) Competitive Strengths & Weaknesses

## 9.17 Haiwu (CN)

9.17.1 Haiwu (CN) Details

9.17.2 Haiwu (CN) Major Business

9.17.3 Haiwu (CN) Dry Cooler for Data Center Product and Services

9.17.4 Haiwu (CN) Dry Cooler for Data Center Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.17.5 Haiwu (CN) Recent Developments/Updates

9.17.6 Haiwu (CN) Competitive Strengths & Weaknesses

## 9.18 Guangdong Shenling Environmental Systems (CN)

9.18.1 Guangdong Shenling Environmental Systems (CN) Details

9.18.2 Guangdong Shenling Environmental Systems (CN) Major Business

9.18.3 Guangdong Shenling Environmental Systems (CN) Dry Cooler for Data Center Product and Services

9.18.4 Guangdong Shenling Environmental Systems (CN) Dry Cooler for Data Center Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.18.5 Guangdong Shenling Environmental Systems (CN) Recent Developments/Updates

9.18.6 Guangdong Shenling Environmental Systems (CN) Competitive Strengths & Weaknesses

## **10 INDUSTRY CHAIN ANALYSIS**

10.1 Dry Cooler for Data Center Industry Chain

10.2 Dry Cooler for Data Center Upstream Analysis

10.2.1 Dry Cooler for Data Center Core Raw Materials

10.2.2 Main Manufacturers of Dry Cooler for Data Center Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Dry Cooler for Data Center Production Mode

10.6 Dry Cooler for Data Center Procurement Model

## 10.7 Dry Cooler for Data Center Industry Sales Model and Sales Channels

### 10.7.1 Dry Cooler for Data Center Sales Model

### 10.7.2 Dry Cooler for Data Center 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 Dry Cooler for Data Center Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Dry Cooler for Data Center Production Value by Region (2021-2026) & (USD Million)

Table 3. World Dry Cooler for Data Center Production Value by Region (2027-2032) & (USD Million)

Table 4. World Dry Cooler for Data Center Production Value Market Share by Region (2021-2026)

Table 5. World Dry Cooler for Data Center Production Value Market Share by Region (2027-2032)

Table 6. World Dry Cooler for Data Center Production by Region (2021-2026) & (K Units)

Table 7. World Dry Cooler for Data Center Production by Region (2027-2032) & (K Units)

Table 8. World Dry Cooler for Data Center Production Market Share by Region (2021-2026)

Table 9. World Dry Cooler for Data Center Production Market Share by Region (2027-2032)

Table 10. World Dry Cooler for Data Center Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Dry Cooler for Data Center Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Dry Cooler for Data Center Major Market Trends

Table 13. World Dry Cooler for Data Center Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)

Table 14. World Dry Cooler for Data Center Consumption by Region (2021-2026) & (K Units)

Table 15. World Dry Cooler for Data Center Consumption Forecast by Region (2027-2032) & (K Units)

Table 16. World Dry Cooler for Data Center Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Dry Cooler for Data Center Producers in 2025

Table 18. World Dry Cooler for Data Center Production by Manufacturer (2021-2026) & (K Units)

Table 19. Production Market Share of Key Dry Cooler for Data Center Producers in 2025

Table 20. World Dry Cooler for Data Center Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Dry Cooler for Data Center Company Evaluation Quadrant

Table 22. World Dry Cooler for Data Center Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Dry Cooler for Data Center Production Site of Key Manufacturer

Table 24. Dry Cooler for Data Center Market: Company Product Type Footprint

Table 25. Dry Cooler for Data Center Market: Company Product Application Footprint

Table 26. Dry Cooler for Data Center Competitive Factors

Table 27. Dry Cooler for Data Center New Entrant and Capacity Expansion Plans

Table 28. Dry Cooler for Data Center Mergers & Acquisitions Activity

Table 29. United States VS China Dry Cooler for Data Center Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Dry Cooler for Data Center Production Comparison, (2021 & 2025 & 2032) & (K Units)

Table 31. United States VS China Dry Cooler for Data Center Consumption Comparison, (2021 & 2025 & 2032) & (K Units)

Table 32. United States Based Dry Cooler for Data Center Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Dry Cooler for Data Center Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Dry Cooler for Data Center Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Dry Cooler for Data Center Production (2021-2026) & (K Units)

Table 36. United States Based Manufacturers Dry Cooler for Data Center Production Market Share (2021-2026)

Table 37. China Based Dry Cooler for Data Center Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Dry Cooler for Data Center Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Dry Cooler for Data Center Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Dry Cooler for Data Center Production, (2021-2026) & (K Units)

Table 41. China Based Manufacturers Dry Cooler for Data Center Production Market

Share (2021-2026)

Table 42. Rest of World Based Dry Cooler for Data Center Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Dry Cooler for Data Center Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Dry Cooler for Data Center Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Dry Cooler for Data Center Production, (2021-2026) & (K Units)

Table 46. Rest of World Based Manufacturers Dry Cooler for Data Center Production Market Share (2021-2026)

Table 47. World Dry Cooler for Data Center Production Value by Capacity, (USD Million), 2021 & 2025 & 2032

Table 48. World Dry Cooler for Data Center Production by Capacity (2021-2026) & (K Units)

Table 49. World Dry Cooler for Data Center Production by Capacity (2027-2032) & (K Units)

Table 50. World Dry Cooler for Data Center Production Value by Capacity (2021-2026) & (USD Million)

Table 51. World Dry Cooler for Data Center Production Value by Capacity (2027-2032) & (USD Million)

Table 52. World Dry Cooler for Data Center Average Price by Capacity (2021-2026) & (US\$/Unit)

Table 53. World Dry Cooler for Data Center Average Price by Capacity (2027-2032) & (US\$/Unit)

Table 54. World Dry Cooler for Data Center Production Value by Casing Material, (USD Million), 2021 & 2025 & 2032

Table 55. World Dry Cooler for Data Center Production by Casing Material (2021-2026) & (K Units)

Table 56. World Dry Cooler for Data Center Production by Casing Material (2027-2032) & (K Units)

Table 57. World Dry Cooler for Data Center Production Value by Casing Material (2021-2026) & (USD Million)

Table 58. World Dry Cooler for Data Center Production Value by Casing Material (2027-2032) & (USD Million)

Table 59. World Dry Cooler for Data Center Average Price by Casing Material (2021-2026) & (US\$/Unit)

Table 60. World Dry Cooler for Data Center Average Price by Casing Material (2027-2032) & (US\$/Unit)

Table 61. World Dry Cooler for Data Center Production Value by Fin Material, (USD Million), 2021 & 2025 & 2032

Table 62. World Dry Cooler for Data Center Production by Fin Material (2021-2026) & (K Units)

Table 63. World Dry Cooler for Data Center Production by Fin Material (2027-2032) & (K Units)

Table 64. World Dry Cooler for Data Center Production Value by Fin Material (2021-2026) & (USD Million)

Table 65. World Dry Cooler for Data Center Production Value by Fin Material (2027-2032) & (USD Million)

Table 66. World Dry Cooler for Data Center Average Price by Fin Material (2021-2026) & (US\$/Unit)

Table 67. World Dry Cooler for Data Center Average Price by Fin Material (2027-2032) & (US\$/Unit)

Table 68. World Dry Cooler for Data Center Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Dry Cooler for Data Center Production by Application (2021-2026) & (K Units)

Table 70. World Dry Cooler for Data Center Production by Application (2027-2032) & (K Units)

Table 71. World Dry Cooler for Data Center Production Value by Application (2021-2026) & (USD Million)

Table 72. World Dry Cooler for Data Center Production Value by Application (2027-2032) & (USD Million)

Table 73. World Dry Cooler for Data Center Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Dry Cooler for Data Center Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Carrier (US) Basic Information, Manufacturing Base and Competitors

Table 76. Carrier (US) Major Business

Table 77. Carrier (US) Dry Cooler for Data Center Product and Services

Table 78. Carrier (US) Dry Cooler for Data Center Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Carrier (US) Recent Developments/Updates

Table 80. Carrier (US) Competitive Strengths & Weaknesses

Table 81. TICA (CN) Basic Information, Manufacturing Base and Competitors

Table 82. TICA (CN) Major Business

Table 83. TICA (CN) Dry Cooler for Data Center Product and Services

- Table 84. TICA (CN) Dry Cooler for Data Center Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 85. TICA (CN) Recent Developments/Updates
- Table 86. TICA (CN) Competitive Strengths & Weaknesses
- Table 87. DCX (PL) Basic Information, Manufacturing Base and Competitors
- Table 88. DCX (PL) Major Business
- Table 89. DCX (PL) Dry Cooler for Data Center Product and Services
- Table 90. DCX (PL) Dry Cooler for Data Center Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 91. DCX (PL) Recent Developments/Updates
- Table 92. DCX (PL) Competitive Strengths & Weaknesses
- Table 93. Vertiv (US) Basic Information, Manufacturing Base and Competitors
- Table 94. Vertiv (US) Major Business
- Table 95. Vertiv (US) Dry Cooler for Data Center Product and Services
- Table 96. Vertiv (US) Dry Cooler for Data Center Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 97. Vertiv (US) Recent Developments/Updates
- Table 98. Vertiv (US) Competitive Strengths & Weaknesses
- Table 99. Alfa Laval (SE) Basic Information, Manufacturing Base and Competitors
- Table 100. Alfa Laval (SE) Major Business
- Table 101. Alfa Laval (SE) Dry Cooler for Data Center Product and Services
- Table 102. Alfa Laval (SE) Dry Cooler for Data Center Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 103. Alfa Laval (SE) Recent Developments/Updates
- Table 104. Alfa Laval (SE) Competitive Strengths & Weaknesses
- Table 105. Kaltra (DE) Basic Information, Manufacturing Base and Competitors
- Table 106. Kaltra (DE) Major Business
- Table 107. Kaltra (DE) Dry Cooler for Data Center Product and Services
- Table 108. Kaltra (DE) Dry Cooler for Data Center Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 109. Kaltra (DE) Recent Developments/Updates
- Table 110. Kaltra (DE) Competitive Strengths & Weaknesses
- Table 111. Stefani (IT) Basic Information, Manufacturing Base and Competitors
- Table 112. Stefani (IT) Major Business
- Table 113. Stefani (IT) Dry Cooler for Data Center Product and Services
- Table 114. Stefani (IT) Dry Cooler for Data Center Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 115. Stefani (IT) Recent Developments/Updates

Table 116. Stefani (IT) Competitive Strengths & Weaknesses

Table 117. Airedale (Modine) (GB) Basic Information, Manufacturing Base and Competitors

Table 118. Airedale (Modine) (GB) Major Business

Table 119. Airedale (Modine) (GB) Dry Cooler for Data Center Product and Services

Table 120. Airedale (Modine) (GB) Dry Cooler for Data Center Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Airedale (Modine) (GB) Recent Developments/Updates

Table 122. Airedale (Modine) (GB) Competitive Strengths & Weaknesses

Table 123. Trane (IE/US) Basic Information, Manufacturing Base and Competitors

Table 124. Trane (IE/US) Major Business

Table 125. Trane (IE/US) Dry Cooler for Data Center Product and Services

Table 126. Trane (IE/US) Dry Cooler for Data Center Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Trane (IE/US) Recent Developments/Updates

Table 128. Trane (IE/US) Competitive Strengths & Weaknesses

Table 129. Kelvion (DE) Basic Information, Manufacturing Base and Competitors

Table 130. Kelvion (DE) Major Business

Table 131. Kelvion (DE) Dry Cooler for Data Center Product and Services

Table 132. Kelvion (DE) Dry Cooler for Data Center Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Kelvion (DE) Recent Developments/Updates

Table 134. Kelvion (DE) Competitive Strengths & Weaknesses

Table 135. Thermofin (DE) Basic Information, Manufacturing Base and Competitors

Table 136. Thermofin (DE) Major Business

Table 137. Thermofin (DE) Dry Cooler for Data Center Product and Services

Table 138. Thermofin (DE) Dry Cooler for Data Center Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Thermofin (DE) Recent Developments/Updates

Table 140. Thermofin (DE) Competitive Strengths & Weaknesses

Table 141. Piovan Group (IT) Basic Information, Manufacturing Base and Competitors

Table 142. Piovan Group (IT) Major Business

Table 143. Piovan Group (IT) Dry Cooler for Data Center Product and Services

Table 144. Piovani Group (IT) Dry Cooler for Data Center Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Piovani Group (IT) Recent Developments/Updates

Table 146. Piovani Group (IT) Competitive Strengths & Weaknesses

Table 147. Baltimore Aircoil Company, Inc. (US) Basic Information, Manufacturing Base and Competitors

Table 148. Baltimore Aircoil Company, Inc. (US) Major Business

Table 149. Baltimore Aircoil Company, Inc. (US) Dry Cooler for Data Center Product and Services

Table 150. Baltimore Aircoil Company, Inc. (US) Dry Cooler for Data Center Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Baltimore Aircoil Company, Inc. (US) Recent Developments/Updates

Table 152. Baltimore Aircoil Company, Inc. (US) Competitive Strengths & Weaknesses

Table 153. Guntner (DE) Basic Information, Manufacturing Base and Competitors

Table 154. Guntner (DE) Major Business

Table 155. Guntner (DE) Dry Cooler for Data Center Product and Services

Table 156. Guntner (DE) Dry Cooler for Data Center Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Guntner (DE) Recent Developments/Updates

Table 158. Guntner (DE) Competitive Strengths & Weaknesses

Table 159. Envicool (CN) Basic Information, Manufacturing Base and Competitors

Table 160. Envicool (CN) Major Business

Table 161. Envicool (CN) Dry Cooler for Data Center Product and Services

Table 162. Envicool (CN) Dry Cooler for Data Center Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Envicool (CN) Recent Developments/Updates

Table 164. Envicool (CN) Competitive Strengths & Weaknesses

Table 165. Square Technology Group (CN) Basic Information, Manufacturing Base and Competitors

Table 166. Square Technology Group (CN) Major Business

Table 167. Square Technology Group (CN) Dry Cooler for Data Center Product and Services

Table 168. Square Technology Group (CN) Dry Cooler for Data Center Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

- Table 169. Square Technology Group (CN) Recent Developments/Updates
- Table 170. Square Technology Group (CN) Competitive Strengths & Weaknesses
- Table 171. Haiwu (CN) Basic Information, Manufacturing Base and Competitors
- Table 172. Haiwu (CN) Major Business
- Table 173. Haiwu (CN) Dry Cooler for Data Center Product and Services
- Table 174. Haiwu (CN) Dry Cooler for Data Center Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 175. Haiwu (CN) Recent Developments/Updates
- Table 176. Haiwu (CN) Competitive Strengths & Weaknesses
- Table 177. Guangdong Shenling Environmental Systems (CN) Basic Information, Manufacturing Base and Competitors
- Table 178. Guangdong Shenling Environmental Systems (CN) Major Business
- Table 179. Guangdong Shenling Environmental Systems (CN) Dry Cooler for Data Center Product and Services
- Table 180. Guangdong Shenling Environmental Systems (CN) Dry Cooler for Data Center Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 181. Guangdong Shenling Environmental Systems (CN) Recent Developments/Updates
- Table 182. Guangdong Shenling Environmental Systems (CN) Competitive Strengths & Weaknesses
- Table 183. Global Key Players of Dry Cooler for Data Center Upstream (Raw Materials)
- Table 184. Global Dry Cooler for Data Center Typical Customers
- Table 185. Dry Cooler for Data Center Typical Distributors

## List Of Figures

### LIST OF FIGURES

- Figure 1. Dry Cooler for Data Center Picture
- Figure 2. World Dry Cooler for Data Center Production Value: 2021 & 2025 & 2032, (USD Million)
- Figure 3. World Dry Cooler for Data Center Production Value and Forecast (2021-2032) & (USD Million)
- Figure 4. World Dry Cooler for Data Center Production (2021-2032) & (K Units)
- Figure 5. World Dry Cooler for Data Center Average Price (2021-2032) & (US\$/Unit)
- Figure 6. World Dry Cooler for Data Center Production Value Market Share by Region (2021-2032)
- Figure 7. World Dry Cooler for Data Center Production Market Share by Region (2021-2032)
- Figure 8. North America Dry Cooler for Data Center Production (2021-2032) & (K Units)
- Figure 9. Europe Dry Cooler for Data Center Production (2021-2032) & (K Units)
- Figure 10. China Dry Cooler for Data Center Production (2021-2032) & (K Units)
- Figure 11. Dry Cooler for Data Center Market Drivers
- Figure 12. Factors Affecting Demand
- Figure 13. World Dry Cooler for Data Center Consumption (2021-2032) & (K Units)
- Figure 14. World Dry Cooler for Data Center Consumption Market Share by Region (2021-2032)
- Figure 15. United States Dry Cooler for Data Center Consumption (2021-2032) & (K Units)
- Figure 16. China Dry Cooler for Data Center Consumption (2021-2032) & (K Units)
- Figure 17. Europe Dry Cooler for Data Center Consumption (2021-2032) & (K Units)
- Figure 18. Japan Dry Cooler for Data Center Consumption (2021-2032) & (K Units)
- Figure 19. South Korea Dry Cooler for Data Center Consumption (2021-2032) & (K Units)
- Figure 20. ASEAN Dry Cooler for Data Center Consumption (2021-2032) & (K Units)
- Figure 21. India Dry Cooler for Data Center Consumption (2021-2032) & (K Units)
- Figure 22. Producer Shipments of Dry Cooler for Data Center by Manufacturer Revenue (\$MM) and Market Share (%): 2025
- Figure 23. Global Four-firm Concentration Ratios (CR4) for Dry Cooler for Data Center Markets in 2025
- Figure 24. Global Four-firm Concentration Ratios (CR8) for Dry Cooler for Data Center Markets in 2025
- Figure 25. United States VS China: Dry Cooler for Data Center Production Value Market

Share Comparison (2021 & 2025 & 2032)

Figure 26. United States VS China: Dry Cooler for Data Center Production Market

Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Dry Cooler for Data Center Consumption Market

Share Comparison (2021 & 2025 & 2032)

Figure 28. United States Based Manufacturers Dry Cooler for Data Center Production Market Share 2025

Figure 29. China Based Manufacturers Dry Cooler for Data Center Production Market Share 2025

Figure 30. Rest of World Based Manufacturers Dry Cooler for Data Center Production Market Share 2025

Figure 31. World Dry Cooler for Data Center Production Value by Capacity, (USD Million), 2021 & 2025 & 2032

Figure 32. World Dry Cooler for Data Center Production Value Market Share by Capacity in 2025

Figure 33. ?500KW

Figure 34. 500-1000KW

Figure 35. 1000-2000KW

Figure 36. ?2000KW

Figure 37. World Dry Cooler for Data Center Production Market Share by Capacity (2021-2032)

Figure 38. World Dry Cooler for Data Center Production Value Market Share by Capacity (2021-2032)

Figure 39. World Dry Cooler for Data Center Average Price by Capacity (2021-2032) & (US\$/Unit)

Figure 40. World Dry Cooler for Data Center Production Value by Casing Material, (USD Million), 2021 & 2025 & 2032

Figure 41. World Dry Cooler for Data Center Production Value Market Share by Casing Material in 2025

Figure 42. Stainless Steel Casing

Figure 43. Aluminum Casing

Figure 44. Other

Figure 45. World Dry Cooler for Data Center Production Market Share by Casing Material (2021-2032)

Figure 46. World Dry Cooler for Data Center Production Value Market Share by Casing Material (2021-2032)

Figure 47. World Dry Cooler for Data Center Average Price by Casing Material (2021-2032) & (US\$/Unit)

Figure 48. World Dry Cooler for Data Center Production Value by Fin Material, (USD

Million), 2021 & 2025 & 2032

Figure 49. World Dry Cooler for Data Center Production Value Market Share by Fin Material in 2025

Figure 50. Aluminum Fins

Figure 51. Copper Fins

Figure 52. Other

Figure 53. World Dry Cooler for Data Center Production Market Share by Fin Material (2021-2032)

Figure 54. World Dry Cooler for Data Center Production Value Market Share by Fin Material (2021-2032)

Figure 55. World Dry Cooler for Data Center Average Price by Fin Material (2021-2032) & (US\$/Unit)

Figure 56. World Dry Cooler for Data Center Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 57. World Dry Cooler for Data Center Production Value Market Share by Application in 2025

Figure 58. Tire 3 Data Center

Figure 59. Tire 4 Data Center

Figure 60. Other

Figure 61. World Dry Cooler for Data Center Production Market Share by Application (2021-2032)

Figure 62. World Dry Cooler for Data Center Production Value Market Share by Application (2021-2032)

Figure 63. World Dry Cooler for Data Center Average Price by Application (2021-2032) & (US\$/Unit)

Figure 64. Dry Cooler for Data Center Industry Chain

Figure 65. Dry Cooler for Data Center Procurement Model

Figure 66. Dry Cooler for Data Center Sales Model

Figure 67. Dry Cooler for Data Center Sales Channels, Direct Sales, and Distribution

Figure 68. Methodology

Figure 69. Research Process and Data Source

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