

# Global Natural Cooling Air-Cooled Chiller Units Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Natural Cooling Air-Cooled Chiller Units market size is expected to reach \$ 1132 million by 2032, rising at a market growth of 5.5% CAGR during the forecast period (2026-2032).

Naturally cooled air-cooled chillers are high-efficiency and energy-saving industrial chiller equipment. They utilize cool outdoor air to directly cool water in low ambient temperatures, thus partially or completely shutting down the compressor, significantly reducing operating energy consumption. They are particularly suitable for year-round cooling scenarios such as data centers and industrial refrigeration. These units are typically equipped with special natural cooling coils, automatic bypass valves, and intelligent control systems that can automatically switch between three modes—'compressor full cooling,' 'compressor and natural cooling mixed,' and 'completely natural cooling'—based on outdoor temperature. They offer advantages such as easy installation, water saving, and low operating and maintenance costs.

The upstream core components of naturally cooled air-cooled chillers include compressors, natural cooling plate heat exchangers, electronic expansion valves, four-way reversing valves, frequency converters, PLC control systems, temperature/pressure sensors, and intelligent group control modules. Downstream demand is highly concentrated in high-energy-consumption, year-round operating, and PUE-sensitive scenarios.

In 2025, global sales of naturally cooled air-cooled chillers reached 22,800 units, with a production capacity of approximately 30,500 units. The average selling price was US\$33,400 per unit, and the average gross profit margin was 28%-35%.

The market supply of natural-cooled air-cooled chillers is relatively fragmented. European, American, and Japanese manufacturers dominate the high-end market due to their mature technologies, energy-saving control systems, and high-end customization capabilities, particularly in data centers and large commercial buildings. Chinese manufacturers have advantages in cost and production capacity, rapidly expanding their market share through localized production and project experience. Overall, market concentration is moderate, but technological barriers and energy efficiency standards remain key barriers to entry into the high-end market.

Demand for natural-cooled air-cooled chillers primarily comes from high-energy-consuming buildings, commercial complexes, data centers, and industrial plants. High-temperature or dry regions have a high acceptance of natural cooling, which effectively reduces cooling energy consumption. Data centers and office buildings are adopting natural-cooled chillers extensively due to energy-saving, green building standards, and low operating cost requirements. Industrial plants and precision manufacturing scenarios are also seeing increased applications due to temperature control and energy efficiency requirements. Overall demand shows a trend towards energy conservation and emission reduction, and peak load optimization.

Technological development of natural-cooled air-cooled chillers is trending towards intelligent control, full frequency conversion, modularization, and high-efficiency heat exchange. The unit uses variable frequency drives to control the fan and compressor, enabling on-demand adjustment; the intelligent control system can perform load forecasting and energy consumption optimization; the modular unit facilitates combination and expansion, adapting to different building and industrial loads; the natural cooling function combined with a high-efficiency heat exchanger can reduce the use of mechanical refrigeration in low-temperature or nighttime environments, thereby saving energy and reducing consumption. Future development will further incorporate low-GWP environmentally friendly refrigerants and remote monitoring technology.

This report studies the global Natural Cooling Air-Cooled Chiller Units production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Natural Cooling Air-Cooled Chiller Units 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 Natural Cooling Air-Cooled Chiller Units that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Natural Cooling Air-Cooled Chiller Units total production and demand, 2021-2032, (K Units)

Global Natural Cooling Air-Cooled Chiller Units total production value, 2021-2032, (USD Million)

Global Natural Cooling Air-Cooled Chiller Units production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Natural Cooling Air-Cooled Chiller Units consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Natural Cooling Air-Cooled Chiller Units domestic production, consumption, key domestic manufacturers and share

Global Natural Cooling Air-Cooled Chiller Units production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Natural Cooling Air-Cooled Chiller Units production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Natural Cooling Air-Cooled Chiller Units production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Natural Cooling Air-Cooled Chiller Units 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, Trane, Johnson Controls, Daikin, Climaveneta, McQuay, Smardt, Shenling Environment, Kaltra, Airedale, 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 Natural Cooling Air-Cooled Chiller Units market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (K 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 Natural Cooling Air-Cooled Chiller Units Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## Global Natural Cooling Air-Cooled Chiller Units Market, Segmentation by Type:

Cooling Capacity <math>\leq 200\text{kW}</math>

Cooling Capacity 200-800kW

Cooling Capacity >800kW

## Global Natural Cooling Air-Cooled Chiller Units Market, Segmentation by Compressor Technology:

Vortex Type

Screw Type

Magnetic Levitation

## Global Natural Cooling Air-Cooled Chiller Units Market, Segmentation by Installation

### Configuration:

Standalone

Modular

### Global Natural Cooling Air-Cooled Chiller Units Market, Segmentation by Application:

Data Centers

Commercial Buildings

Medical Facilities

Industrial Manufacturing

Others

### Companies Profiled:

Carrier

Trane

Johnson Controls

Daikin

Climaveneta

McQuay

Smardt

Shenling Environment

Kaltra

Airedale

Swegon

Mitsubishi Electric

Shenzhen Simpsan

Gree

Multistack

Midea

LG Electronics

#### Key Questions Answered:

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

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