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Data Center Chillers Market Size, Share & Trends Analysis Report By Product (Air-Cooled Chillers, Water-Cooled Chillers), By Modular Capacity, By Compressor (Centrifugal, Screw, Scroll, Oil-free/Magnetic-bearing), By Deployment, By Region, And Segment Forecasts, 2026 - 2033

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Abstracts

The global data center chillers market size was valued at USD 841.0 million in 2025 and is projected to grow from USD 891.8 million in 2026 to USD 1,450.5 million by 2033, at a CAGR of 7.2% from 2026 to 2033. North America dominated the market, accounting for a revenue share of 56.6% in 2025. The rapid expansion of hyperscale, colocation, and AI-focused data centers is a major market growth driver.

Growing cloud adoption, digitalization, and AI workloads are increasing computing capacity and rack power density, resulting in higher heat loads and greater demand for reliable thermal management. High-density AI and HPC infrastructure requires advanced cooling systems capable of maintaining stable operating temperatures while supporting continuous workloads, creating opportunities for high-capacity air-cooled and water-cooled chillers.

The increasing focus on energy efficiency, operational reliability, and cooling optimization is further supporting chiller adoption. Data center operators are seeking efficient systems that can reduce cooling-related energy consumption, improve PUE, and maintain uptime across large-scale facilities. This is encouraging the adoption of variable-speed compressors, oil-free/magnetic-bearing technologies, free-cooling configurations, and higher-efficiency water-cooled systems, particularly in hyperscale and continuously operating facilities. At the same time, rapid data center construction

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and capacity expansion are creating additional demand for new chiller installations and replacement of aging cooling equipment.

Global Data Center Chillers Market Report Segmentation

This report forecasts revenue growth at the global, regional, and country levels and provides an analysis of the latest industry trends in each of the sub-segments from 2021 to 2033. For this study, Grand View Research has segmented the global data center chillers market report based on product, modular capacity, compressor, deployment, and region:

Product Outlook (Revenue, USD Million, 2021 - 2033)

Air-Cooled Chillers

Water-Cooled Chillers

Modular Capacity Outlook (Revenue, USD Million, 2021 - 2033)

<500 kW

501-1000kW

1001-1500kW

>1501kW

Compressor Outlook (Revenue, USD Million, 2021 - 2033)

Centrifugal

Screw

Scroll

Oil-free/Magnetic-bearing

Deployment Outlook (Revenue, USD Million, 2021 - 2033)

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New Installation

Replacement

Regional Outlook (Revenue, USD Million, 2021 - 2033)

North America

U.S.

Canada

Mexico

Europe

Germany

France

Italy

Spain

UK

Asia Pacific

China

India

Japan

South Korea

Australia

Latin America

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Brazil

Argentina

Middle East and Africa

Saudi Arabia

South Africa

UAE

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