

Cooling Tower Market Report by Tower Type (Open-Circuit Cooling Towers, Closed-Circuit Cooling Towers, Hybrid Cooling Towers), Flow Type (Cross Flow, Counter Flow), Design (Mechanical Draft Cooling Tower, Natural Draft Cooling Tower), Construction Material (Fiber-Reinforced Plastic (FRP), Steel, Concrete, Wood, High-Density Polyethylene (HDPE), and Others), End-User (Chemical, HVAC, Petrochemicals and Oil & Gas, Power Generation, Food and Beverages, and Others), and Region 2024-2032

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Abstracts

The global cooling tower market size reached US\$ 3.0 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 4.3 Billion by 2032, exhibiting a growth rate (CAGR) of 3.9% during 2024-2032. The market is experiencing steady growth driven by heightened energy costs and concerns associated with energy expenditure, rising adoption of sustainable measures in various industrial operations, and increasing integration of digital technologies and cloud computing.

Cooling Tower Market Analysis:

Major Market Drivers: One of the key market drivers includes changing weather patterns. Moreover, there is an increase in the need to upgrade aging infrastructure, which is acting as a growth-inducing factor.

Key Market Trends: The rising focus on energy efficiency and industrial expansion are main trends in the market.

Geographical Trends: As per the report, Asia Pacific exhibits a clear dominance, accounting for the biggest market share due to the increasing need to dissipate heat and maintain operational efficiency, coupled with the thriving power generation sector.

Competitive Landscape: Numerous players in the cooling tower industry include Babcock & Wilcox Enterprises Inc., Baltimore Aircoil Company Inc. (Amsted Industries Inc.), Brentwood Industries Inc., Delta Cooling Towers Inc., ENEXIO Management GmbH, Hamon Corporation (Hamon & Cie), International Cooling Tower Inc., Johnson Controls Inc., SPX Cooling Technologies Inc., Reymsa Cooling Towers Inc., Thermal Care Inc. (IPEG Inc.), Thermax Limited (RDA Holdings Private Limited), among many others.

Challenges and Opportunities: Rising health and safety concerns among individuals, along with water scarcity or stringent water conservation regulations, are major market challenges. Nonetheless, the increasing focus on water conservation and recycling and integration of smart and connected technologies represent key opportunities in the market.

Cooling Tower Market Trends:

Rising Focus on Energy Efficiency

Organizations are emphasizing energy conservation due to rising energy costs. Cooling towers are essential as they dissipate heat produced by power production facilities, HVAC systems, and industrial operations. Innovative cooling towers are developed by manufacturers in response to the increasing need for economical and eco-friendly solutions. Market players are developing cutting-edge systems by using superior materials and technology to maximize energy efficiency. Furthermore, cooling towers equipped with variable frequency drives (VFDs) can modify fan speeds in accordance with the cooling load, leading to energy savings. Additionally, by reducing water use while preserving thermal performance, hybrid cooling towers offer greater efficiency. As businesses seek to reduce their carbon footprint and operating expenses, the energy-efficient cooling tower demand increases. On 20 March 2023, Babcock & Wilcox (B&W) announced that its B&W Environmental business segment has been awarded a contract

for more than US\$ 9 Million to design and supply two cooling systems for a clean hydrogen production facility in the Middle East. B&W Environmental will supply two SPIG® fiberglass-reinforced polymer (FRP) cooling towers to provide efficient and low-emissions cooling for a plant that will use renewable energy sources to produce hydrogen.

Industrial expansion

The expansion of industrial activities, particularly in emerging economies, is propelling the cooling tower market growth. Effective cooling systems are essential for a variety of industries including data centers, manufacturing, petrochemicals, and power production, in order to preserve both product quality and operational effectiveness. Emerging economies are experiencing rapid industrialization and urbanization, leading to increased demand for electricity, manufactured goods, and infrastructure. Efficient cooling solutions are required to disperse surplus heat produced during production operations and power generation. Cooling towers play a crucial role in maintaining continuous operations in industrial facilities by controlling the temperature. In addition, the growing complexity in the data center sector brought by the digital technologies and cloud computing is accelerating the need for cooling solutions that can manage heat loads produced by high-density servers. The IMARC Group predicts that the global data center market size will hit US\$ 461.8 Billion by 2032.

Stringent environmental regulations

Governing agencies of various countries are implementing stringent environmental regulations related to water conservation and emissions control, which is offering a positive cooling tower market outlook. They are mandating rigorous standards to address water scarcity and curb emissions of pollutants including volatile organic compounds (VOCs). Cooling towers are linked to these regulations due to their water-intensive nature. To comply with water conservation mandates, cooling tower manufacturers are developing innovative solutions such as dry cooling towers, which assist in reducing water consumption as compared to traditional evaporative cooling systems. These water-saving technologies not only help industries meet regulatory requirements but also contribute to sustainability efforts. Furthermore, emissions control regulations aim to minimize the release of harmful pollutants into the atmosphere. Cooling towers can contribute to air quality challenges through the emission of particulate matter and other substances. To address this concern, modern cooling towers are equipped with advanced filtration systems and air quality controls to ensure compliance with emission standards. On 28 November 2023, Hydroleap announced a

strategic partnership with IX Technology (IXT), a leading Singapore-based provider of data center mechanical and electrical (M&E) infrastructure solutions. This is aimed at transforming water management in cooling towers and allowing organizations in the data center industry to reduce water consumption, lower chemical use, bring down the carbon footprint, and improve regulatory compliance.

Cooling Tower Market Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with cooling tower market forecast at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on tower type, flow type, design, construction material, and end-user.

Breakup by Tower Type:

- Open-Circuit Cooling Towers

- Closed-Circuit Cooling Towers

- Hybrid Cooling Towers

Open-circuit cooling towers account for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the tower type. This includes open-circuit cooling towers, closed-circuit cooling towers, and hybrid cooling towers. According to the report, open-circuit cooling towers represented the largest segment.

The open design of open-circuit cooling towers permits direct contact between the process water and surrounding air, giving them their distinctive feature. Open-circuit cooling towers are employed in many different industrial applications, especially in the heavy manufacturing and power plant sectors. They are also well-known for being reasonably priced and excellent at dissipating substantial amounts of heat. They are dependent on a constant supply of water since evaporation occurs continuously.

Breakup by Flow Type:

- Cross Flow

Counter Flow

Cross flow holds the largest share of the industry

A detailed breakup and analysis of the market based on the flow type have also been provided in the report. This includes cross flow and counter flow. According to the report, cross flow accounted for the largest market share.

Cross flow cooling towers are renowned for their small size and effective construction. They facilitate efficient heat exchange by having water and air flows that are perpendicular to one another. They are utilized in diverse industrial applications, including as small- to medium-sized industrial operations, commercial buildings, and HVAC systems. These towers have a reputation for being dependable and simple to maintain. Their cost-effectiveness is leading to their widespread acceptance, making them a preferred solution for sectors looking to balance cooling system affordability and performance.

Breakup by Design:

Mechanical Draft Cooling Tower

Natural Draft Cooling Tower

Mechanical draft cooling tower represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the design. This includes mechanical draft cooling tower and natural draft cooling tower. According to the report, mechanical draft cooling tower represented the largest segment.

Mechanical draft cooling towers rely on mechanical components such as fans or blowers to create airflow through the tower, enhancing the heat exchange process. They are widely used across industries because of their flexibility and ability to maintain consistent performance even in variable environmental conditions. They offer precise control over airflow, making them suitable for applications with specific cooling requirements. They are commonly found in power plants, manufacturing facilities, and

HVAC systems where efficient cooling is essential. The dominance of mechanical draft cooling towers can be attributed to their adaptability, reliability, and ability to deliver efficient thermal performance. On 21 August 2023, John Cockerill Hamon announced that it would build the world's largest induced draft cooling tower for the world's largest natural gas deposit in Qatar.

Breakup by Construction Material:

Fiber-Reinforced Plastic (FRP)

Steel

Concrete

Wood

High-Density Polyethylene (HDPE)

Others

Fiber-reinforced plastic (FRP) exhibits a clear dominance in the market

A detailed breakup and analysis of the market based on the construction material have also been provided in the report. This includes fiber-reinforced plastic (FRP), steel, concrete, wood, high-density polyethylene (HDPE), and others. According to the report, fiber-reinforced plastic (FRP) accounted for the largest market share.

Fiber-reinforced plastic (FRP) cooling towers are known for their durability, corrosion resistance, and lightweight properties. FRP is a composite material that combines a polymer matrix with reinforcing fibers, typically glass or carbon. FRP cooling towers are used across various industries on account of their ability to withstand harsh environmental conditions and aggressive chemicals. Their low maintenance requirements and long lifespan make them a cost-effective choice. FRP can provide reliable cooling solutions for a wide range of applications.

Breakup by End-User:

Chemical

HVAC

Petrochemicals and Oil and Gas

Power Generation

Food and Beverages

Others

Power generation dominates the market

The report has provided a detailed breakup and analysis of the market based on the end-user. This includes chemical, HVAC, petrochemicals and oil and gas, power generation, food and beverages, and others. According to the report, power generation represented the largest segment.

Power generation relies on cooling towers to dissipate the heat generated during electricity production. Whether in coal, natural gas, nuclear, or renewable energy plants, cooling towers are integral for maintaining safe operating temperatures. Their efficient heat removal capabilities are essential for ensuring the continuous and reliable operation of power plants. The need for cooling towers in the power generation sector is driven by the growing need for electricity worldwide.

Breakup by Region:

North America

United States

Canada

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Asia Pacific leads the market, accounting for the largest cooling tower market share

Cooling Tower Market Report by Tower Type (Open-Circuit Cooling Towers, Closed-Circuit Cooling Towers, Hybrid...

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific represents the largest regional market for cooling tower.

In the Asia Pacific region, various industrial activities like manufacturing and petrochemicals are driving the demand for cooling towers to dissipate heat and maintain operational efficiency. Besides this, favorable government initiatives are bolstering the market growth. In addition, the thriving power generation industry, particularly in India and China, represent cooling tower market recent opportunities in the region. For instance, the India Climate and Energy Dashboard (ICED) stated that the total power installed capacity recorded 442.77 GW as of 30 April 2024 in India.

Competitive Landscape:

The research market report has also provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the major market players in the cooling tower industry include Babcock & Wilcox Enterprises Inc., Baltimore Aircoil Company Inc. (Amsted Industries Inc.), Brentwood Industries Inc., Delta Cooling Towers Inc., ENEXIO Management GmbH, Hamon Corporation (Hamon & Cie), International Cooling Tower Inc., Johnson Controls Inc., SPX Cooling Technologies Inc., Reymsa Cooling Towers Inc., Thermal Care Inc. (IPEG Inc.), and Thermax Limited (RDA Holdings Private Limited).

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Key players in the market are engaging in several strategic initiatives to maintain their competitive edge. These initiatives include continuous research and development (R&D) to enhance the efficiency and sustainability of cooling towers, with a focus on incorporating advanced materials and technologies. Additionally, top players are expanding their global presence through mergers and acquisitions (M&As) and partnerships to tap into emerging markets, diversify their product portfolios, and increase their cooling tower market

revenue. Furthermore, the rising emphasis on providing customized solutions to meet the specific needs of various industries such as power generation, petrochemicals, and data centers is supporting the market growth. This customer-centric approach allows key players to address unique cooling challenges and strengthen their market position as trusted providers of cooling solutions. On 21 April 2023, Baltimore Aircoil Company (BAC), the global leader in modular evaporative cooling equipment, showcased its innovative suite of cooling tower solutions for the steel industry at AISTech 2023.

Cooling Tower Market Recent Developments:

3 February 2023: Baltimore Aircoil Company (BAC), a Maryland-based manufacturer showcased its CO₂ (R744) adiabatic condenser/gas cooler, which is widely used in transcritical CO₂ (R744) systems and hybrid cooling solutions on adiabatic heat rejection at the International Air-Conditioning, Heating, Refrigeration Exposition (AHR Expo) that held at the Georgia World Congress Center (GWCC) in Atlanta, Georgia.

29 November 2023: Metso launched its upgraded Evaporative Cooling Tower, an efficient dry gas cleaning solution designed to cool down hot furnace off-gases by means of evaporation. The evaporative cooling tower is followed by a hot electrostatic precipitator or a bag filter that cools the gas from about 600-700 °C to about 200-350 °C. The tower operates dry, meaning that all water added is evaporated.

On 19 October 2023: SPX Cooling Tech, a full-service cooling tower and air-cooled heat exchanger manufacturer, opened a manufacturing facility in Springfield, creating more than 60 new jobs as part of a capital plan focused on incremental capacity of SPX Cooling Tech products manufactured in the U.S.

Key Questions Answered in This Report:

How has the global cooling tower market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global market?

What is the impact of each driver, restraint, and opportunity on the global market?

What are the key regional markets?

Which countries represent the most attractive market?

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