

South Korea Data Center Cooling Market Size, Share, Trends and Forecast by Component, Type of Cooling, Cooling Technology, Type of Data Center, Vertical, and Region, 2026-2034

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Abstracts

The South Korea data center cooling market size reached USD 375.4 Million in 2025. The market is projected to reach USD 1,141.9 Million by 2034, exhibiting a growth rate (CAGR) of 12.76% during 2026-2034. Edge computing supports applications like 5G, which generate continuous data traffic and require stable performance. Edge data centers need compact, efficient cooling due to space limits and high heat loads, especially in urban areas. Besides this, government initiatives aimed at promoting digital infrastructure and smart cities are fueling the South Korea data center cooling market share.

SOUTH KOREA DATA CENTER COOLING MARKET TRENDS:

Increasing adoption of edge computing

Rising adoption of edge computing is positively influencing the market in South Korea. As more businesses and service providers are deploying edge data centers to process data closer to users and devices, the number of small to mid-sized facilities is increasing across the country. These edge data centers are often located in compact urban spaces, creating a strong need for efficient, space-saving, and highly reliable cooling systems. Edge facilities operate in more variable environments and may not always have ideal ventilation or climate control. This makes advanced cooling solutions essential to maintain optimal temperatures and prevent equipment failure. Edge computing also supports applications like the Internet of Things (IoT), smart cities, and 5G, which generate continuous data traffic and require stable performance. Cooling

systems for edge centers must be energy-efficient, quiet, and adaptable to smaller footprints. As more devices and services continue to rely on low-latency data processing, the demand for robust edge infrastructure is growing, further promoting the use of localized and reliable cooling solutions. South Korea's strong digital ecosystem, fast urbanization, and increasing reliance on real-time services are making edge computing a key factor in shaping the future of the data center cooling market. As per industry reports, the South Korea edge computing market is set to attain USD 1.17 Billion by 2029.

Rising government support

Increasing government support is impelling the South Korea data center cooling market growth. The government is actively facilitating digital transformation, smart cities, and 5G expansion, which require reliable and efficient data infrastructure. As a result, more data centers are being planned and built with strong regulatory backing and investment incentives. Government policies are often promoting the employment of energy-optimized and eco-friendly technologies, leading data center operators to adopt advanced cooling systems that reduce power utilization and carbon emissions. Supportive frameworks also include tax benefits and public-private partnerships, which accelerate innovations in the cooling industry. Additionally, the government sets standards for green building practices, which include thermal management guidelines for data facilities. These efforts help create a strong requirement for modern cooling technologies, such as liquid cooling, free cooling, and artificial intelligence (AI)-oriented thermal management. With South Korea aiming to become a regional digital hub, government initiatives continue to strengthen the foundation for large-scale and edge data centers. In December 2024, the industry minister of South Korea declared that the nation intended to develop cooling systems for data centers as part of its new export initiatives. The government would allocate 350 Billion won (USD 250 Million) in trade insurance for exporting such cooling apparatus, along with providing additional essential assistance, such as locating new customers.

SOUTH KOREA DATA CENTER COOLING MARKET SEGMENTATION:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the country and regional levels for 2026-2034. Our report has categorized the market based on component, type of cooling, cooling technology, type of data center, and vertical.

Component Insights:

Solution

Air Conditioning

Chilling Units

Cooling Towers

Economizer Systems

Liquid Cooling Systems

Control Systems

Others

Services

Consulting

Installation and Deployment

Maintenance and Support

The report has provided a detailed breakup and analysis of the market based on the component. This includes solution (air conditioning, chilling units, cooling towers, economizer systems, liquid cooling systems, control systems, and others) and services (consulting, installation and deployment, and maintenance and support).

Type of Cooling Insights:

Room-Based Cooling

Row-Based Cooling

Rack-Based Cooling

A detailed breakup and analysis of the market based on the type of cooling have also been provided in the report. This includes room-based cooling, row-based cooling, and rack-based cooling.

Cooling Technology Insights:

Liquid-Based Cooling

Air-Based Cooling

The report has provided a detailed breakup and analysis of the market based on the cooling technology. This includes liquid-based cooling and air-based cooling.

Type of Data Center Insights:

Small-Scale Data Center

Medium-Scale Data Center

Large-Scale Data Center

A detailed breakup and analysis of the market based on the type of data center have also been provided in the report. This includes small-scale data center, medium-scale data center, and large-scale data center.

Vertical Insights:

BFSI

IT and Telecom

Research and Educational Institutes

Government and Defense

Retail

Energy

Healthcare

The report has provided a detailed breakup and analysis of the market based on the vertical. This includes BFSI, IT and telecom, research and educational institutes, government and defense, retail, energy, healthcare, and others.

Regional Insights:

Seoul Capital Area

Yeongnam (Southeastern Region)

Honam (Southwestern Region)

Hoseo (Central Region)

The report has also provided a comprehensive analysis of all the major regional markets, which include Seoul Capital Area, Yeongnam (Southeastern Region), Honam (Southwestern Region), Hoseo (Central Region), and others.

COMPETITIVE LANDSCAPE:

The market research report has also provided a comprehensive analysis of the competitive landscape. Competitive analysis such as market structure, key player positioning, top winning strategies, competitive dashboard, and company evaluation quadrant has been covered in the report. Also, detailed profiles of all major companies have been provided.

KEY QUESTIONS ANSWERED IN THIS REPORT

How has the South Korea data center cooling market performed so far and how will it perform in the coming years?

What is the breakup of the South Korea data center cooling market on the basis of component?

What is the breakup of the South Korea data center cooling market on the basis of type of cooling?

What is the breakup of the South Korea data center cooling market on the basis of cooling technology?

What is the breakup of the South Korea data center cooling market on the basis of type of data center?

What is the breakup of the South Korea data center cooling market on the basis of vertical?

What is the breakup of the South Korea data center cooling market on the basis of region?

What are the various stages in the value chain of the South Korea data center cooling market?

What are the key driving factors and challenges in the South Korea data center cooling market?

What is the structure of the South Korea data center cooling market and who are the key players?

What is the degree of competition in the South Korea data center cooling market?

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