

# Global Data Center Cooling Market - Forecasts from 2019 to 2024

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## Abstracts

The global data center cooling market is projected to grow at a CAGR of 9.38% during the forecast period to reach a total market size of US\$6,953.958 million in 2024 from US\$4,059.920 million in 2018. The rising number of data centers worldwide, owing to the increasing demand for additional storage space to store massive data is the key driver of the data center cooling market. Growing power consumption demands efficient low power consuming data center cooling solutions. Shift towards cloud computing by a number of organizations is further spurring the demand for data center cooling solutions and technologies. The development of telecommunication infrastructure worldwide requires effective data storage facilities to manage and analyze an enormous amount of data, resulting in setting up new infrastructure, in turn bolstering the growth of the global data center cooling market. Also, an increased focus on IT centralization will catapult the demand for cooling solutions in the forthcoming years. Geographically, North America holds the largest share of the global data center cooling market owing to technological developments and the matured IT sector in the region. The rising number of technology-concentrated start-ups in North America also offers an opportunity for vendors of data center cooling solutions in the coming years. Stringent environmental regulations and energy efficiency standards in Europe will lead to market growth in the region during the forecast period. Asia Pacific is anticipated to witness the fastest regional market growth due to the high demand from China and expanding IT sector in emerging economies like India in the coming years.

The use of air conditioners is considered conventional for data center cooling and has found a place in all centers historically, thus comprising a huge market. However technological advancement, concerns regarding emissions and the associated social costs are expected to slow down growth in the future. Computer room air conditioning (CRAC) units are already increasingly replacing air-conditioning units as climate control

has become an important part of the data center's infrastructure. The market for air conditioners in data centers is thus expected to witness slow growth, driven by regions that are at a nascent stage in technology up-gradation.

The requirements for small, medium and large enterprises may vary as the investments made by them towards the data centers are different in scope. Traditionally, large enterprises have been the major adopter of cooling solutions, as these enterprises owned and operated their own data centers. As the cost of ownership of data centers has declined over the years and cloud computing and virtualization has gained momentum, medium and small enterprises have also started investing in new data center space to take advantage of reduced operating costs while assisting them to gain a competitive edge over the peers. Large enterprises segment accounted for the largest share of the global data center cooling market in 2018 and will continue to dominate this market over the next five years. Small and medium enterprises segment accounted for a respectable share and are projected to at a healthy CAGR during the forecast period.

Data center cooling market has been segmented by industry vertical as banking/financial services, manufacturing, technology, energy, healthcare, central/local government, entertainment and media, education, and others. Communication and Technology contributed to the largest share owing to dramatic growth in the demand for compute, storage and communications capacity. Banking/Financial services also held a significant share of the global share as banks and other financial institutions are using data centers to improve the performance and scalability of critical back-end applications, including transactional and analytical workloads. However, the healthcare sector will witness the fastest growth of the data center cooling market at the highest CAGR during the forecast period. This high growth is attributed to rising digital data due to technological advances coupled with increasing applications containing electronically protected health information (ePHI) in the healthcare sector. Central/Local Government sector will also witness a significant market growth over the forecast period in order to eliminate downtime and speed up troubleshooting with affordable integrated data protection and smart analytics to deliver efficiently the required public services.

The North American region is the major market for data center cooling solutions, followed by Europe. The region will continue to dominate the global data center cooling market due to the presence of some of the biggest enterprises of the world, which are increasingly investing data centers. The presence of a large number of suppliers, early adoption of new solutions, and favorable government policies are some of the factors contributing to market growth. Even, though the region continues to dominate the global market, high growth being observed in the Asia Pacific region will lead to a decline in its

share over the forecast period, but this region will continue to remain the dominant market during the course of the forecast period. Asia Pacific will grow at the fastest CAGR while the Middle East and Africa and South America are anticipated to witness steady growth.

## Segmentation

The global data center cooling market has been analyzed through the following segments:

### By Solutions

Air Conditioners

Chillers

Economizers

Cooling Towers

Others

### By Enterprise Size

Small

Medium

Large

### By End-User

Colocation Service Provider

Cloud Service Providers

Enterprise

### By Industry Vertical

Banking and Financial Services

Manufacturing

Healthcare

Communication and Technology

Energy

Education

Government

Media and Entertainment

Others

By Geography

North America

USA

Canada

Mexico

South America

Brazil

Others

Europe

United Kingdom

Germany

France

Others

Middle East and Africa

Saudi Arabia

Israel

Others

Asia Pacific

China

India

Australia

Japan

Others

## Contents

### **1. INTRODUCTION**

- 1.1. Market Overview
- 1.2. Market Definition
- 1.3. Scope of the Study
- 1.4. Currency
- 1.5. Assumptions
- 1.6. Base, and Forecast Years Timeline

### **2. RESEARCH METHODOLOGY**

- 2.1. Research Design
- 2.2. Secondary Sources

### **3. EXECUTIVE SUMMARY**

### **4. MARKET DYNAMICS**

- 4.1. Market Segmentation
- 4.2. Market Drivers
- 4.3. Market Restraints
- 4.4. Market Opportunities
- 4.5. Porter's Five Forces Analysis
  - 4.5.1. Bargaining Power of Suppliers
  - 4.5.2. Bargaining Power of Buyers
  - 4.5.3. Threat of New Entrants
  - 4.5.4. Threat of Substitutes
  - 4.5.5. Competitive Rivalry in the Industry
- 4.6. Life Cycle Analysis - Regional Snapshot
- 4.7. Market Attractiveness

### **5. GLOBAL DATA CENTER COOLING MARKET BY SOLUTIONS**

- 5.1. Air Conditioners
- 5.2. Chillers
- 5.3. Economizers
- 5.4. Cooling Towers

## 5.5. Others

## 6. GLOBAL DATA CENTER COOLING MARKET BY ENTERPRISE SIZE

### 6.1. Small

### 6.2. Medium

### 6.3. Large

## 7. GLOBAL DATA CENTER COOLING MARKET BY END-USER

### 7.1. Colocation Services Providers

### 7.2. Cloud Service Providers

### 7.3. Enterprise

## 8. GLOBAL DATA CENTER COOLING MARKET BY INDUSTRY VERTICAL

### 8.1. Banking and Financial Services

### 8.2. Manufacturing

### 8.3. Healthcare

### 8.4. Communication and Technology

### 8.5. Energy

### 8.6. Education

### 8.7. Government

### 8.8. Media and Entertainment

### 8.9. Others

## 9. GLOBAL DATA CENTER COOLING MARKET BY GEOGRAPHY

### 9.1. North America

#### 9.1.1. USA

#### 9.1.2. Canada

#### 9.1.3. Mexico

### 9.2. South America

#### 9.2.1. Brazil

#### 9.2.2. Others

### 9.3. Europe

#### 9.3.1. United Kingdom

#### 9.3.2. Germany

#### 9.3.3. France

9.3.4. Others

9.4. Middle East and Africa

9.4.1. Saudi Arabia

9.4.2. Israel

9.4.3. Others

9.5. Asia Pacific

9.5.1. China

9.5.2. India

9.5.3. Australia

9.5.4. Japan

9.5.5. Others

## **10. COMPETITIVE INTELLIGENCE**

10.1. Market Positioning Matrix and Ranking

10.2. Recent Investments and Deals

10.3. Strategies of Key Players

## **11. COMPANY PROFILES**

11.1. Schneider Electric

11.2. Vertiv Group Corporation

11.3. IBM

11.4. Hewlett-Packard Development Company, L.P

11.5. Rittal GmbH & Co. KG

11.6. Hitachi Ltd.

11.7. STULZ GmbH

11.8. Coolcentric

11.9. Fujitsu

11.10. Eaton

11.11. 3M



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