

Global Data Center Cooling Optimization Software Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Data Center Cooling Optimization Software market size is predicted to grow from US\$ 521 million in 2025 to US\$ 1691 million in 2032; it is expected to grow at a CAGR of 18.3% from 2026 to 2032.

Data Center Cooling Optimization Software refers to specialized software platforms and optimization modules used to improve the thermal performance, cooling efficiency and operating stability of data centers. The software typically collects and analyzes IT load, rack temperature, humidity, differential pressure, airflow, chilled-water and cooling-water temperatures, coolant flow, equipment power consumption and operating data from chillers, cooling towers, pumps, CRAC/CRAH units, fan walls and coolant distribution units. Using rule-based optimization, mathematical models, machine learning, reinforcement learning, model predictive control, computational fluid dynamics or physics-based digital twins, these solutions generate recommendations or automatically adjust cooling capacity, equipment sequencing, fan and pump speeds, supply-water temperatures, airflow distribution and cooling setpoints. The market primarily covers standalone AI cooling optimization platforms, supervisory and closed-loop control software, thermal digital twins, chiller-plant optimization software, white-space cooling optimization modules and dedicated cooling optimization functions embedded within DCIM, BMS, EMS or cooling-control environments. Commercial applications span hyperscale and AI data centers, colocation facilities, enterprise data centers, telecom facilities and other mission-critical computing environments.

Key Findings

The confirmed market structure contains 22 core suppliers, 16 extended suppliers and 13 additional companies under verification

North America and Europe host the densest clusters of specialized AI cooling optimization and digital-twin software suppliers

China features a comparatively strong integrated model combining cooling equipment, energy management, DCIM and optimization software

Supervisory optimization and thermal analytics form the established commercial base, while autonomous control and liquid-cooling optimization are emerging rapidly

Competition spans pure-play AI software, digital twins, DCIM platforms, industrial automation groups and cooling equipment manufacturers

Market Trends

Data Center Cooling Optimization Software is moving from monitoring and advisory analytics toward active supervisory optimization and bounded autonomous control. Traditional software mainly visualized temperatures, airflow and cooling utilization, whereas newer platforms increasingly connect IT load, thermal conditions and cooling infrastructure in a continuous feedback loop, dynamically adjusting cooling capacity and operating setpoints according to changing workloads. Schneider Electric and Siemens already commercialize software that actively optimizes cooling rather than merely displaying facility conditions, while physics-based digital twins are increasingly being used to evaluate cooling, capacity and failure scenarios during both design and operation. AI and HPC are accelerating this transition because rapidly changing GPU loads create more dynamic thermal conditions than conventional enterprise workloads. ASHRAE's 2026 AI data center framework highlights the rise of rack densities from around 120 kW toward several hundred kilowatts, increasing the need to coordinate air cooling, chilled-water infrastructure and liquid-cooling loops. The longer-term product direction is therefore toward hybrid physics-plus-AI models, real-time digital twins, workload-aware cooling, liquid-cooling optimization and safer closed-loop control with operating constraints and fallback mechanisms.

Market Dynamics

Drivers

The principal growth driver is the increasing thermal and power intensity of data center infrastructure. The IEA estimates that global data center electricity consumption

increased strongly in 2025 and could rise from about 485 TWh in 2025 to approximately 950 TWh by 2030, while electricity consumption from AI-focused data centers grows substantially faster. This expansion raises the economic value of optimizing existing cooling capacity rather than relying only on additional physical infrastructure. Higher rack density, variable GPU workloads, tighter power availability and the transition toward mixed air-and-liquid cooling architectures are also increasing the number of operating variables that facility teams must coordinate. At the policy level, energy-performance reporting requirements for data centers in the European Union and U.S. programs supporting advanced cooling technologies are strengthening demand for measurable improvements in energy and thermal performance.

Restraints

Market adoption remains constrained by integration complexity, operational risk and the fragmented control architecture of existing data centers. Optimization software must connect reliably with different generations and brands of BMS, DCIM, PLC, CRAC/CRAH, chillers, pumps, sensors and increasingly CDUs, while maintaining redundancy and thermal safety. Many operators are willing to use analytics and recommended setpoints but remain more cautious about allowing third-party software to write directly into mission-critical control systems. The commercial model can also be difficult to standardize because products are licensed by site, rack, capacity, software module or subscription and are frequently bundled with engineering, controls or cooling equipment. These factors extend validation cycles, complicate software-only revenue attribution and favor suppliers that can demonstrate stable operation across heterogeneous facilities.

Opportunities

The most attractive opportunities are emerging around AI factories, high-density GPU clusters, retrofit optimization and hybrid air-liquid cooling. As rack densities rise, optimization value is shifting from simple energy savings toward capacity release, thermal-risk reduction and more effective utilization of constrained power and cooling infrastructure. Liquid cooling creates an additional software layer around CDU operation, coolant temperature, flow control, heat rejection and coordination with residual air cooling, while digital twins can increasingly bridge design, commissioning and live operations. Suppliers capable of operating above existing BMS and equipment controls without requiring wholesale hardware replacement have an opportunity to penetrate brownfield colocation and enterprise facilities. Policy-driven efficiency reporting and increasingly transparent sustainability metrics in Europe may also create

additional demand for software that can continuously measure, explain and optimize cooling performance.

Challenges

The main long-term challenge is proving optimization performance without compromising data center availability. Cooling control algorithms must respond to rapidly changing workloads while respecting equipment limitations, redundancy requirements and site-specific operating rules, making deployment considerably more demanding than generic building HVAC optimization. Cybersecurity, data sovereignty and customer requirements for on-premises or air-gapped operation can further raise implementation costs. Another structural challenge is platform bundling: capabilities that are currently sold by independent AI optimization vendors may increasingly be incorporated into DCIM, BMS, liquid-cooling controls and cooling OEM software stacks. As a result, independent suppliers will need to demonstrate equipment-agnostic integration, measurable energy or capacity benefits, robust fallback logic and clear lifecycle economics rather than relying on AI functionality alone.

Value Chain Analysis

The upstream layer of the Data Center Cooling Optimization Software value chain consists primarily of operational data and enabling technologies rather than conventional physical raw materials. Key inputs include temperature, humidity, pressure, flow and power sensors; BMS, PLC, DCIM and equipment-control interfaces; IT workload and rack telemetry; cloud and edge computing infrastructure; CFD and digital-twin engines; AI/ML frameworks; and domain knowledge covering refrigeration, hydronics, airflow and facility control. The quality, granularity and latency of these inputs directly affect optimization accuracy. As liquid cooling expands, data from CDUs, coolant loops, pumps and heat-rejection systems is becoming increasingly important, widening the software integration boundary from white-space cooling toward the complete thermal chain.

The midstream value is created by software vendors that transform facility data into thermal models, predictions, recommended setpoints or executable control decisions. Value generally increases as the product moves from visualization to predictive analytics, supervisory optimization and validated closed-loop control because the software becomes more directly linked to energy savings, capacity utilization and reliability. Downstream customers include hyperscale operators, colocation providers, enterprise data centers, telecom operators and other mission-critical facilities. Pure

software companies tend to have relatively asset-light cost structures but face substantial R&D, integration and customer-validation expenses, while cooling and automation OEMs can leverage installed equipment, service networks and native control interfaces. This difference explains why the market supports both specialist software vendors and large infrastructure groups.

Segment Insights

By primary optimization function, advisory analytics and supervisory setpoint optimization currently represent the broadest established commercial base because they can improve cooling efficiency while preserving the customer's existing BMS and equipment-level control architecture. Closed-loop autonomous control is a smaller but strategically important direction, particularly for facilities with dense instrumentation, standardized controls and rapidly changing AI workloads. Schneider Electric's Cooling Optimize uses active cooling control, while Siemens combines sensors, cooling controls and an AI engine to match cooling with IT load, demonstrating the transition from passive monitoring toward operational optimization. Thermal digital twins form another important segment, with applications extending from new data center design and capacity planning to retrofit evaluation and operating optimization. Cadence's data center digital-twin portfolio illustrates how physics-based simulation can model design configurations, cooling performance and failure scenarios before changes are implemented physically.

By cooling domain, white-space air cooling and central chilled-water plant optimization remain the most mature commercial applications, while liquid-cooling loop and hybrid whole-system optimization offer stronger incremental technology opportunities. The shift toward high-density AI computing increasingly requires software to coordinate air-side thermal conditions, water-side equipment and CDU-level liquid systems rather than optimize each subsystem independently. From a deployment perspective, on-premises or hybrid architectures remain important for mission-critical customers because real-time control, cybersecurity and resilience requirements often favor local execution, while cloud platforms remain valuable for model training, fleet analytics and multi-site benchmarking.

Downstream Market Opportunities

Hyperscale and AI infrastructure represent the most technically demanding opportunity because fast-changing GPU workloads, high rack densities and constrained utility capacity increase the economic cost of both insufficient and excessive cooling.

Colocation facilities constitute another attractive customer group because heterogeneous tenant loads and frequent capacity changes create persistent demand for thermal visibility, capacity planning and cooling optimization. Enterprise and telecom data centers provide a substantial retrofit opportunity, particularly where legacy cooling equipment remains serviceable but control strategies are conservative or fragmented. Across these customer groups, the purchasing rationale is increasingly shifting from energy savings alone toward a broader combination of power-capacity release, avoidance of thermal hot spots, higher usable rack density, reduced manual tuning and improved resilience under rapidly changing workloads. ASHRAE's AI data center framework reinforces the importance of integrated thermal design and operation as facility densities increase.

Regional Insights

North America and Europe currently have the deepest concentration of specialized Data Center Cooling Optimization Software suppliers in the confirmed vendor pool. North America is particularly active in autonomous AI control, reinforcement-learning-oriented optimization and software-led approaches, supported by a large hyperscale and AI infrastructure base. Europe has a diversified supplier structure spanning AI optimization, chiller-plant control, thermal digital twins and industrial automation, while regulatory emphasis on data center energy-performance reporting and sustainability rating is adding another commercial driver for measurable optimization technologies. The European Commission has already established energy-performance reporting requirements and is developing a broader rating and minimum-performance framework for data centers.

China represents a distinct competitive model in which cooling optimization software is more frequently embedded within data center infrastructure, precision cooling, energy-management or DCIM solutions rather than sold solely as independent SaaS. This supports strong local delivery and equipment integration but makes software-only market measurement more complex. Japan is entering a more active development phase as HVAC, electronics and IT groups explore AI-driven thermal management, while South Korea and India currently show a greater proportion of integrated infrastructure and service-oriented participants than confirmed cooling-optimization pure plays. Southeast Asia, led by Singapore, is developing a smaller but notable ecosystem around AI operations and digital twins as regional data center capacity expands.

Competitive Landscape Analysis

The competitive landscape is fragmented and technology-diverse rather than dominated by a single software category. The confirmed core pool contains 22 suppliers, supplemented by 16 extended suppliers whose cooling optimization activities are more tightly integrated with DCIM, building controls, energy management or cooling hardware, plus 13 additional companies retained for further verification. Large infrastructure and automation groups compete through installed equipment bases, native control interfaces, global service organizations and their ability to bundle software with broader data center projects. Pure-play AI suppliers compete on equipment independence, algorithmic optimization, deployment speed and the ability to generate measurable operational benefits without requiring wholesale replacement of existing cooling infrastructure. Digital-twin specialists differentiate through physics-based modeling and scenario analysis, particularly where customers need to understand airflow, thermal capacity and failure behavior before physical changes are made. Strategic consolidation is reinforcing convergence between these models: Cadence acquired Future Facilities to expand physics-based data center digital-twin capabilities, while Vertiv acquired Waylay to strengthen AI-based monitoring, predictive services and infrastructure optimization. The next phase of competition is therefore likely to focus less on whether a vendor can provide AI analytics and more on whether it can safely integrate across heterogeneous equipment, optimize both air and liquid cooling, operate under mission-critical constraints, and convert optimization into demonstrable energy, capacity and reliability improvements.

Report Scope

LPI (LP Information)' newest research report, the "Data Center Cooling Optimization Software Industry Forecast" looks at past sales and reviews total world Data Center Cooling Optimization Software sales in 2025, providing a comprehensive analysis by region and market sector of projected Data Center Cooling Optimization Software sales for 2026 through 2032. With Data Center Cooling Optimization Software sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Data Center Cooling Optimization Software industry.

This Insight Report provides a comprehensive analysis of the global Data Center Cooling Optimization Software landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Data Center Cooling Optimization Software portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Data Center Cooling

Optimization Software market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Data Center Cooling Optimization Software and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Data Center Cooling Optimization Software.

This report presents a comprehensive overview, market shares, and growth opportunities of Data Center Cooling Optimization Software market by product type, application, key players and key regions and countries.

Market Segmentation

Segmentation by Type:

Advisory and Analytics Optimization

Supervisory Setpoint Optimization

Closed-loop Autonomous Control

Thermal Digital Twin and Simulation

Others

Segmentation by Primary Cooling Domain:

White-space Air Cooling

Central Chilled-water Plant

Liquid Cooling Loop & CDU

Whole-system Cooling

Others

Segmentation by Deployment Model:

Cloud-based

On-premise

Segmentation by Application:

Internet and Cloud Computing Industry

Finance and Banking

Government and Public Computing Power

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Schneider Electric SE

Siemens AG

Huawei Investment & Holding Co., Ltd.

Vigilent Corporation

Carrier Global Corporation

Phaidra Inc.

Cadence Design Systems, Inc.

EkkoSense Ltd

etalytics GmbH

STULZ GmbH

Modine Manufacturing Company

Trane Technologies plc

Vertiv Holdings Co

Optimum Energy LLC

ZTE Corporation

Mitsubishi Electric Corporation

Delta Electronics, Inc.

Johnson Controls International plc

Modius, Inc.

Sunbird Software, Inc.

Gamma Technologies, LLC

Red Dot AI Pte Ltd

FNT GmbH

Shenzhen Envicool Technology Co., Ltd.

Lucend

ZutaCore, Inc.

OctaiPipe

FLUIX Inc.

Zhuhai Pilot Technology Co., Ltd.

Nanjing Canatal Data-Centre Environmental Tech Co., Ltd.

Beijing Jiamu Kerui Technology Co., Ltd.

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Data Center Cooling Optimization Software Market Size (2021-2032)
 - 2.1.2 Data Center Cooling Optimization Software Market Size CAGR by Region (2021 VS 2025 VS 2032)
 - 2.1.3 World Current & Future Analysis for Data Center Cooling Optimization Software by Country/Region (2021, 2025 & 2032)
- 2.2 Data Center Cooling Optimization Software Segment by Type
 - 2.2.1 Advisory and Analytics Optimization
 - 2.2.2 Supervisory Setpoint Optimization
 - 2.2.3 Closed-loop Autonomous Control
 - 2.2.4 Thermal Digital Twin and Simulation
 - 2.2.5 Others
 - 2.2.6 Data Center Cooling Optimization Software Market Size by Type
 - 2.2.6.1 Data Center Cooling Optimization Software Market Size CAGR by Type (2021 VS 2025 VS 2032)
 - 2.2.6.2 Global Data Center Cooling Optimization Software Market Size Market Share by Type (2021-2026)
- 2.3 Data Center Cooling Optimization Software Segment by Primary Cooling Domain
 - 2.3.1 White-space Air Cooling
 - 2.3.2 Central Chilled-water Plant
 - 2.3.3 Liquid Cooling Loop & CDU
 - 2.3.4 Whole-system Cooling
 - 2.3.5 Others
 - 2.3.6 Data Center Cooling Optimization Software Market Size by Primary Cooling

Domain

2.3.6.1 Data Center Cooling Optimization Software Market Size CAGR by Primary Cooling Domain (2021 VS 2025 VS 2032)

2.3.6.2 Global Data Center Cooling Optimization Software Market Size Market Share by Primary Cooling Domain (2021-2026)

2.4 Data Center Cooling Optimization Software Segment by Deployment Model

2.4.1 Cloud-based

2.4.2 On-premise

2.4.3 Data Center Cooling Optimization Software Market Size by Deployment Model

2.4.3.1 Data Center Cooling Optimization Software Market Size CAGR by Deployment Model (2021 VS 2025 VS 2032)

2.4.3.2 Global Data Center Cooling Optimization Software Market Size Market Share by Deployment Model (2021-2026)

2.5 Data Center Cooling Optimization Software Segment by Application

2.5.1 Internet and Cloud Computing Industry

2.5.2 Finance and Banking

2.5.3 Government and Public Computing Power

2.5.4 Others

2.5.5 Data Center Cooling Optimization Software Market Size by Application

2.5.5.1 Data Center Cooling Optimization Software Market Size CAGR by Application (2021 VS 2025 VS 2032)

2.5.5.2 Global Data Center Cooling Optimization Software Market Size Market Share by Application (2021-2026)

3 DATA CENTER COOLING OPTIMIZATION SOFTWARE MARKET SIZE BY PLAYER

3.1 Data Center Cooling Optimization Software Market Size Market Share by Player

3.1.1 Global Data Center Cooling Optimization Software Revenue by Player (2021-2026)

3.1.2 Global Data Center Cooling Optimization Software Revenue Market Share by Player (2021-2026)

3.2 Global Data Center Cooling Optimization Software Key Players Head office and Products Offered

3.3 Market Concentration Rate Analysis

3.3.1 Competition Landscape Analysis

3.3.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.4 New Products and Potential Entrants

3.5 Mergers & Acquisitions, Expansion

4 DATA CENTER COOLING OPTIMIZATION SOFTWARE BY REGION

4.1 Data Center Cooling Optimization Software Market Size by Region (2021-2026)

4.2 Global Data Center Cooling Optimization Software Annual Revenue by Country/Region (2021-2026)

4.3 Americas Data Center Cooling Optimization Software Market Size Growth (2021-2026)

4.4 APAC Data Center Cooling Optimization Software Market Size Growth (2021-2026)

4.5 Europe Data Center Cooling Optimization Software Market Size Growth (2021-2026)

4.6 Middle East & Africa Data Center Cooling Optimization Software Market Size Growth (2021-2026)

5 AMERICAS

5.1 Americas Data Center Cooling Optimization Software Market Size by Country (2021-2026)

5.2 Americas Data Center Cooling Optimization Software Market Size by Type (2021-2026)

5.3 Americas Data Center Cooling Optimization Software Market Size by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Data Center Cooling Optimization Software Market Size by Region (2021-2026)

6.2 APAC Data Center Cooling Optimization Software Market Size by Type (2021-2026)

6.3 APAC Data Center Cooling Optimization Software Market Size by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

7 EUROPE

7.1 Europe Data Center Cooling Optimization Software Market Size by Country (2021-2026)

7.2 Europe Data Center Cooling Optimization Software Market Size by Type (2021-2026)

7.3 Europe Data Center Cooling Optimization Software Market Size by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Data Center Cooling Optimization Software by Region (2021-2026)

8.2 Middle East & Africa Data Center Cooling Optimization Software Market Size by Type (2021-2026)

8.3 Middle East & Africa Data Center Cooling Optimization Software Market Size by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 GLOBAL DATA CENTER COOLING OPTIMIZATION SOFTWARE MARKET FORECAST

- 10.1 Global Data Center Cooling Optimization Software Forecast by Region (2027-2032)
 - 10.1.1 Global Data Center Cooling Optimization Software Forecast by Region (2027-2032)
 - 10.1.2 Americas Data Center Cooling Optimization Software Forecast
 - 10.1.3 APAC Data Center Cooling Optimization Software Forecast
 - 10.1.4 Europe Data Center Cooling Optimization Software Forecast
 - 10.1.5 Middle East & Africa Data Center Cooling Optimization Software Forecast
- 10.2 Americas Data Center Cooling Optimization Software Forecast by Country (2027-2032)
 - 10.2.1 United States Market Data Center Cooling Optimization Software Forecast
 - 10.2.2 Canada Market Data Center Cooling Optimization Software Forecast
 - 10.2.3 Mexico Market Data Center Cooling Optimization Software Forecast
 - 10.2.4 Brazil Market Data Center Cooling Optimization Software Forecast
- 10.3 APAC Data Center Cooling Optimization Software Forecast by Region (2027-2032)
 - 10.3.1 China Data Center Cooling Optimization Software Market Forecast
 - 10.3.2 Japan Market Data Center Cooling Optimization Software Forecast
 - 10.3.3 Korea Market Data Center Cooling Optimization Software Forecast
 - 10.3.4 Southeast Asia Market Data Center Cooling Optimization Software Forecast
 - 10.3.5 India Market Data Center Cooling Optimization Software Forecast
 - 10.3.6 Australia Market Data Center Cooling Optimization Software Forecast
- 10.4 Europe Data Center Cooling Optimization Software Forecast by Country (2027-2032)
 - 10.4.1 Germany Market Data Center Cooling Optimization Software Forecast
 - 10.4.2 France Market Data Center Cooling Optimization Software Forecast
 - 10.4.3 UK Market Data Center Cooling Optimization Software Forecast
 - 10.4.4 Italy Market Data Center Cooling Optimization Software Forecast
 - 10.4.5 Russia Market Data Center Cooling Optimization Software Forecast
- 10.5 Middle East & Africa Data Center Cooling Optimization Software Forecast by Region (2027-2032)
 - 10.5.1 Egypt Market Data Center Cooling Optimization Software Forecast
 - 10.5.2 South Africa Market Data Center Cooling Optimization Software Forecast
 - 10.5.3 Israel Market Data Center Cooling Optimization Software Forecast
 - 10.5.4 Turkey Market Data Center Cooling Optimization Software Forecast
- 10.6 Global Data Center Cooling Optimization Software Forecast by Type (2027-2032)
- 10.7 Global Data Center Cooling Optimization Software Forecast by Application (2027-2032)
 - 10.7.1 GCC Countries Market Data Center Cooling Optimization Software Forecast

11 KEY PLAYERS ANALYSIS

11.1 Schneider Electric SE

11.1.1 Schneider Electric SE Company Information

11.1.2 Schneider Electric SE Data Center Cooling Optimization Software Product Offered

11.1.3 Schneider Electric SE Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.1.4 Schneider Electric SE Main Business Overview

11.1.5 Schneider Electric SE Latest Developments

11.2 Siemens AG

11.2.1 Siemens AG Company Information

11.2.2 Siemens AG Data Center Cooling Optimization Software Product Offered

11.2.3 Siemens AG Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.2.4 Siemens AG Main Business Overview

11.2.5 Siemens AG Latest Developments

11.3 Huawei Investment & Holding Co., Ltd.

11.3.1 Huawei Investment & Holding Co., Ltd. Company Information

11.3.2 Huawei Investment & Holding Co., Ltd. Data Center Cooling Optimization Software Product Offered

11.3.3 Huawei Investment & Holding Co., Ltd. Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.3.4 Huawei Investment & Holding Co., Ltd. Main Business Overview

11.3.5 Huawei Investment & Holding Co., Ltd. Latest Developments

11.4 Vigilant Corporation

11.4.1 Vigilant Corporation Company Information

11.4.2 Vigilant Corporation Data Center Cooling Optimization Software Product Offered

11.4.3 Vigilant Corporation Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.4.4 Vigilant Corporation Main Business Overview

11.4.5 Vigilant Corporation Latest Developments

11.5 Carrier Global Corporation

11.5.1 Carrier Global Corporation Company Information

11.5.2 Carrier Global Corporation Data Center Cooling Optimization Software Product Offered

11.5.3 Carrier Global Corporation Data Center Cooling Optimization Software

Revenue, Gross Margin and Market Share (2021-2026)

11.5.4 Carrier Global Corporation Main Business Overview

11.5.5 Carrier Global Corporation Latest Developments

11.6 Phaidra Inc.

11.6.1 Phaidra Inc. Company Information

11.6.2 Phaidra Inc. Data Center Cooling Optimization Software Product Offered

11.6.3 Phaidra Inc. Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.6.4 Phaidra Inc. Main Business Overview

11.6.5 Phaidra Inc. Latest Developments

11.7 Cadence Design Systems, Inc.

11.7.1 Cadence Design Systems, Inc. Company Information

11.7.2 Cadence Design Systems, Inc. Data Center Cooling Optimization Software Product Offered

11.7.3 Cadence Design Systems, Inc. Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.7.4 Cadence Design Systems, Inc. Main Business Overview

11.7.5 Cadence Design Systems, Inc. Latest Developments

11.8 EkkoSense Ltd

11.8.1 EkkoSense Ltd Company Information

11.8.2 EkkoSense Ltd Data Center Cooling Optimization Software Product Offered

11.8.3 EkkoSense Ltd Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.8.4 EkkoSense Ltd Main Business Overview

11.8.5 EkkoSense Ltd Latest Developments

11.9 etalytics GmbH

11.9.1 etalytics GmbH Company Information

11.9.2 etalytics GmbH Data Center Cooling Optimization Software Product Offered

11.9.3 etalytics GmbH Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.9.4 etalytics GmbH Main Business Overview

11.9.5 etalytics GmbH Latest Developments

11.10 STULZ GmbH

11.10.1 STULZ GmbH Company Information

11.10.2 STULZ GmbH Data Center Cooling Optimization Software Product Offered

11.10.3 STULZ GmbH Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.10.4 STULZ GmbH Main Business Overview

11.10.5 STULZ GmbH Latest Developments

11.11 Modine Manufacturing Company

11.11.1 Modine Manufacturing Company Company Information

11.11.2 Modine Manufacturing Company Data Center Cooling Optimization Software Product Offered

11.11.3 Modine Manufacturing Company Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.11.4 Modine Manufacturing Company Main Business Overview

11.11.5 Modine Manufacturing Company Latest Developments

11.12 Trane Technologies plc

11.12.1 Trane Technologies plc Company Information

11.12.2 Trane Technologies plc Data Center Cooling Optimization Software Product Offered

11.12.3 Trane Technologies plc Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.12.4 Trane Technologies plc Main Business Overview

11.12.5 Trane Technologies plc Latest Developments

11.13 Vertiv Holdings Co

11.13.1 Vertiv Holdings Co Company Information

11.13.2 Vertiv Holdings Co Data Center Cooling Optimization Software Product Offered

11.13.3 Vertiv Holdings Co Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.13.4 Vertiv Holdings Co Main Business Overview

11.13.5 Vertiv Holdings Co Latest Developments

11.14 Optimum Energy LLC

11.14.1 Optimum Energy LLC Company Information

11.14.2 Optimum Energy LLC Data Center Cooling Optimization Software Product Offered

11.14.3 Optimum Energy LLC Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.14.4 Optimum Energy LLC Main Business Overview

11.14.5 Optimum Energy LLC Latest Developments

11.15 ZTE Corporation

11.15.1 ZTE Corporation Company Information

11.15.2 ZTE Corporation Data Center Cooling Optimization Software Product Offered

11.15.3 ZTE Corporation Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.15.4 ZTE Corporation Main Business Overview

11.15.5 ZTE Corporation Latest Developments

11.16 Mitsubishi Electric Corporation

11.16.1 Mitsubishi Electric Corporation Company Information

11.16.2 Mitsubishi Electric Corporation Data Center Cooling Optimization Software Product Offered

11.16.3 Mitsubishi Electric Corporation Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.16.4 Mitsubishi Electric Corporation Main Business Overview

11.16.5 Mitsubishi Electric Corporation Latest Developments

11.17 Delta Electronics, Inc.

11.17.1 Delta Electronics, Inc. Company Information

11.17.2 Delta Electronics, Inc. Data Center Cooling Optimization Software Product Offered

11.17.3 Delta Electronics, Inc. Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.17.4 Delta Electronics, Inc. Main Business Overview

11.17.5 Delta Electronics, Inc. Latest Developments

11.18 Johnson Controls International plc

11.18.1 Johnson Controls International plc Company Information

11.18.2 Johnson Controls International plc Data Center Cooling Optimization Software Product Offered

11.18.3 Johnson Controls International plc Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.18.4 Johnson Controls International plc Main Business Overview

11.18.5 Johnson Controls International plc Latest Developments

11.19 Modius, Inc.

11.19.1 Modius, Inc. Company Information

11.19.2 Modius, Inc. Data Center Cooling Optimization Software Product Offered

11.19.3 Modius, Inc. Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.19.4 Modius, Inc. Main Business Overview

11.19.5 Modius, Inc. Latest Developments

11.20 Sunbird Software, Inc.

11.20.1 Sunbird Software, Inc. Company Information

11.20.2 Sunbird Software, Inc. Data Center Cooling Optimization Software Product Offered

11.20.3 Sunbird Software, Inc. Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.20.4 Sunbird Software, Inc. Main Business Overview

11.20.5 Sunbird Software, Inc. Latest Developments

11.21 Gamma Technologies, LLC

11.21.1 Gamma Technologies, LLC Company Information

11.21.2 Gamma Technologies, LLC Data Center Cooling Optimization Software Product Offered

11.21.3 Gamma Technologies, LLC Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.21.4 Gamma Technologies, LLC Main Business Overview

11.21.5 Gamma Technologies, LLC Latest Developments

11.22 Red Dot AI Pte Ltd

11.22.1 Red Dot AI Pte Ltd Company Information

11.22.2 Red Dot AI Pte Ltd Data Center Cooling Optimization Software Product Offered

11.22.3 Red Dot AI Pte Ltd Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.22.4 Red Dot AI Pte Ltd Main Business Overview

11.22.5 Red Dot AI Pte Ltd Latest Developments

11.23 FNT GmbH

11.23.1 FNT GmbH Company Information

11.23.2 FNT GmbH Data Center Cooling Optimization Software Product Offered

11.23.3 FNT GmbH Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.23.4 FNT GmbH Main Business Overview

11.23.5 FNT GmbH Latest Developments

11.24 Shenzhen Envicool Technology Co., Ltd.

11.24.1 Shenzhen Envicool Technology Co., Ltd. Company Information

11.24.2 Shenzhen Envicool Technology Co., Ltd. Data Center Cooling Optimization Software Product Offered

11.24.3 Shenzhen Envicool Technology Co., Ltd. Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.24.4 Shenzhen Envicool Technology Co., Ltd. Main Business Overview

11.24.5 Shenzhen Envicool Technology Co., Ltd. Latest Developments

11.25 Lucend

11.25.1 Lucend Company Information

11.25.2 Lucend Data Center Cooling Optimization Software Product Offered

11.25.3 Lucend Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)

11.25.4 Lucend Main Business Overview

11.25.5 Lucend Latest Developments

11.26 ZutaCore, Inc.

- 11.26.1 ZutaCore, Inc. Company Information
- 11.26.2 ZutaCore, Inc. Data Center Cooling Optimization Software Product Offered
- 11.26.3 ZutaCore, Inc. Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)
- 11.26.4 ZutaCore, Inc. Main Business Overview
- 11.26.5 ZutaCore, Inc. Latest Developments
- 11.27 OctaiPipe
 - 11.27.1 OctaiPipe Company Information
 - 11.27.2 OctaiPipe Data Center Cooling Optimization Software Product Offered
 - 11.27.3 OctaiPipe Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)
 - 11.27.4 OctaiPipe Main Business Overview
 - 11.27.5 OctaiPipe Latest Developments
- 11.28 FLUIX Inc.
 - 11.28.1 FLUIX Inc. Company Information
 - 11.28.2 FLUIX Inc. Data Center Cooling Optimization Software Product Offered
 - 11.28.3 FLUIX Inc. Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)
 - 11.28.4 FLUIX Inc. Main Business Overview
 - 11.28.5 FLUIX Inc. Latest Developments
- 11.29 Zhuhai Pilot Technology Co., Ltd.
 - 11.29.1 Zhuhai Pilot Technology Co., Ltd. Company Information
 - 11.29.2 Zhuhai Pilot Technology Co., Ltd. Data Center Cooling Optimization Software Product Offered
 - 11.29.3 Zhuhai Pilot Technology Co., Ltd. Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)
 - 11.29.4 Zhuhai Pilot Technology Co., Ltd. Main Business Overview
 - 11.29.5 Zhuhai Pilot Technology Co., Ltd. Latest Developments
- 11.30 Nanjing Canatal Data-Centre Environmental Tech Co., Ltd.
 - 11.30.1 Nanjing Canatal Data-Centre Environmental Tech Co., Ltd. Company Information
 - 11.30.2 Nanjing Canatal Data-Centre Environmental Tech Co., Ltd. Data Center Cooling Optimization Software Product Offered
 - 11.30.3 Nanjing Canatal Data-Centre Environmental Tech Co., Ltd. Data Center Cooling Optimization Software Revenue, Gross Margin and Market Share (2021-2026)
 - 11.30.4 Nanjing Canatal Data-Centre Environmental Tech Co., Ltd. Main Business Overview
 - 11.30.5 Nanjing Canatal Data-Centre Environmental Tech Co., Ltd. Latest Developments

11.31 Beijing Jiamu Kerui Technology Co., Ltd.

11.31.1 Beijing Jiamu Kerui Technology Co., Ltd. Company Information

11.31.2 Beijing Jiamu Kerui Technology Co., Ltd. Data Center Cooling Optimization
Software Product Offered

11.31.3 Beijing Jiamu Kerui Technology Co., Ltd. Data Center Cooling Optimization
Software Revenue, Gross Margin and Market Share (2021-2026)

11.31.4 Beijing Jiamu Kerui Technology Co., Ltd. Main Business Overview

11.31.5 Beijing Jiamu Kerui Technology Co., Ltd. Latest Developments

12 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Data Center Cooling Optimization Software Market Size CAGR by Region (2021 VS 2025 VS 2032) & (\$ millions)

Table 2. Data Center Cooling Optimization Software Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Advisory and Analytics Optimization

Table 4. Major Players of Supervisory Setpoint Optimization

Table 5. Major Players of Closed-loop Autonomous Control

Table 6. Major Players of Thermal Digital Twin and Simulation

Table 7. Major Players of Others

Table 8. Data Center Cooling Optimization Software Market Size CAGR by Type (2021 VS 2025 VS 2032) & (\$ millions)

Table 9. Global Data Center Cooling Optimization Software Market Size by Type (2021-2026) & (\$ millions)

Table 10. Global Data Center Cooling Optimization Software Market Size Market Share by Type (2021-2026)

Table 11. Major Players of White-space Air Cooling

Table 12. Major Players of Central Chilled-water Plant

Table 13. Major Players of Liquid Cooling Loop & CDU

Table 14. Major Players of Whole-system Cooling

Table 15. Major Players of Others

Table 16. Data Center Cooling Optimization Software Market Size CAGR by Primary Cooling Domain (2021 VS 2025 VS 2032) & (\$ millions)

Table 17. Global Data Center Cooling Optimization Software Market Size by Primary Cooling Domain (2021-2026) & (\$ millions)

Table 18. Global Data Center Cooling Optimization Software Market Size Market Share by Primary Cooling Domain (2021-2026)

Table 19. Major Players of Cloud-based

Table 20. Major Players of On-premise

Table 21. Data Center Cooling Optimization Software Market Size CAGR by Deployment Model (2021 VS 2025 VS 2032) & (\$ millions)

Table 22. Global Data Center Cooling Optimization Software Market Size by Deployment Model (2021-2026) & (\$ millions)

Table 23. Global Data Center Cooling Optimization Software Market Size Market Share by Deployment Model (2021-2026)

Table 24. Data Center Cooling Optimization Software Market Size CAGR by Application

(2021 VS 2025 VS 2032) & (\$ millions)

Table 25. Global Data Center Cooling Optimization Software Market Size by Application (2021-2026) & (\$ millions)

Table 26. Global Data Center Cooling Optimization Software Market Size Market Share by Application (2021-2026)

Table 27. Global Data Center Cooling Optimization Software Revenue by Player (2021-2026) & (\$ millions)

Table 28. Global Data Center Cooling Optimization Software Revenue Market Share by Player (2021-2026)

Table 29. Data Center Cooling Optimization Software Key Players Head office and Products Offered

Table 30. Data Center Cooling Optimization Software Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 31. New Products and Potential Entrants

Table 32. Mergers & Acquisitions, Expansion

Table 33. Global Data Center Cooling Optimization Software Market Size by Region (2021-2026) & (\$ millions)

Table 34. Global Data Center Cooling Optimization Software Market Size Market Share by Region (2021-2026)

Table 35. Global Data Center Cooling Optimization Software Revenue by Country/Region (2021-2026) & (\$ millions)

Table 36. Global Data Center Cooling Optimization Software Revenue Market Share by Country/Region (2021-2026)

Table 37. Americas Data Center Cooling Optimization Software Market Size by Country (2021-2026) & (\$ millions)

Table 38. Americas Data Center Cooling Optimization Software Market Size Market Share by Country (2021-2026)

Table 39. Americas Data Center Cooling Optimization Software Market Size by Type (2021-2026) & (\$ millions)

Table 40. Americas Data Center Cooling Optimization Software Market Size Market Share by Type (2021-2026)

Table 41. Americas Data Center Cooling Optimization Software Market Size by Application (2021-2026) & (\$ millions)

Table 42. Americas Data Center Cooling Optimization Software Market Size Market Share by Application (2021-2026)

Table 43. APAC Data Center Cooling Optimization Software Market Size by Region (2021-2026) & (\$ millions)

Table 44. APAC Data Center Cooling Optimization Software Market Size Market Share by Region (2021-2026)

Table 45. APAC Data Center Cooling Optimization Software Market Size by Type (2021-2026) & (\$ millions)

Table 46. APAC Data Center Cooling Optimization Software Market Size by Application (2021-2026) & (\$ millions)

Table 47. Europe Data Center Cooling Optimization Software Market Size by Country (2021-2026) & (\$ millions)

Table 48. Europe Data Center Cooling Optimization Software Market Size Market Share by Country (2021-2026)

Table 49. Europe Data Center Cooling Optimization Software Market Size by Type (2021-2026) & (\$ millions)

Table 50. Europe Data Center Cooling Optimization Software Market Size by Application (2021-2026) & (\$ millions)

Table 51. Middle East & Africa Data Center Cooling Optimization Software Market Size by Region (2021-2026) & (\$ millions)

Table 52. Middle East & Africa Data Center Cooling Optimization Software Market Size by Type (2021-2026) & (\$ millions)

Table 53. Middle East & Africa Data Center Cooling Optimization Software Market Size by Application (2021-2026) & (\$ millions)

Table 54. Key Market Drivers & Growth Opportunities of Data Center Cooling Optimization Software

Table 55. Key Market Challenges & Risks of Data Center Cooling Optimization Software

Table 56. Key Industry Trends of Data Center Cooling Optimization Software

Table 57. Global Data Center Cooling Optimization Software Market Size Forecast by Region (2027-2032) & (\$ millions)

Table 58. Global Data Center Cooling Optimization Software Market Size Market Share Forecast by Region (2027-2032)

Table 59. Global Data Center Cooling Optimization Software Market Size Forecast by Type (2027-2032) & (\$ millions)

Table 60. Global Data Center Cooling Optimization Software Market Size Forecast by Application (2027-2032) & (\$ millions)

Table 61. Schneider Electric SE Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 62. Schneider Electric SE Data Center Cooling Optimization Software Product Offered

Table 63. Schneider Electric SE Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 64. Schneider Electric SE Main Business

Table 65. Schneider Electric SE Latest Developments

Table 66. Siemens AG Details, Company Type, Data Center Cooling Optimization

Software Area Served and Its Competitors

Table 67. Siemens AG Data Center Cooling Optimization Software Product Offered

Table 68. Siemens AG Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 69. Siemens AG Main Business

Table 70. Siemens AG Latest Developments

Table 71. Huawei Investment & Holding Co., Ltd. Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 72. Huawei Investment & Holding Co., Ltd. Data Center Cooling Optimization Software Product Offered

Table 73. Huawei Investment & Holding Co., Ltd. Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 74. Huawei Investment & Holding Co., Ltd. Main Business

Table 75. Huawei Investment & Holding Co., Ltd. Latest Developments

Table 76. Vigilent Corporation Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 77. Vigilent Corporation Data Center Cooling Optimization Software Product Offered

Table 78. Vigilent Corporation Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 79. Vigilent Corporation Main Business

Table 80. Vigilent Corporation Latest Developments

Table 81. Carrier Global Corporation Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 82. Carrier Global Corporation Data Center Cooling Optimization Software Product Offered

Table 83. Carrier Global Corporation Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 84. Carrier Global Corporation Main Business

Table 85. Carrier Global Corporation Latest Developments

Table 86. Phaidra Inc. Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 87. Phaidra Inc. Data Center Cooling Optimization Software Product Offered

Table 88. Phaidra Inc. Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 89. Phaidra Inc. Main Business

Table 90. Phaidra Inc. Latest Developments

Table 91. Cadence Design Systems, Inc. Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 92. Cadence Design Systems, Inc. Data Center Cooling Optimization Software Product Offered

Table 93. Cadence Design Systems, Inc. Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 94. Cadence Design Systems, Inc. Main Business

Table 95. Cadence Design Systems, Inc. Latest Developments

Table 96. EkkoSense Ltd Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 97. EkkoSense Ltd Data Center Cooling Optimization Software Product Offered

Table 98. EkkoSense Ltd Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 99. EkkoSense Ltd Main Business

Table 100. EkkoSense Ltd Latest Developments

Table 101. etalytics GmbH Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 102. etalytics GmbH Data Center Cooling Optimization Software Product Offered

Table 103. etalytics GmbH Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 104. etalytics GmbH Main Business

Table 105. etalytics GmbH Latest Developments

Table 106. STULZ GmbH Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 107. STULZ GmbH Data Center Cooling Optimization Software Product Offered

Table 108. STULZ GmbH Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 109. STULZ GmbH Main Business

Table 110. STULZ GmbH Latest Developments

Table 111. Modine Manufacturing Company Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 112. Modine Manufacturing Company Data Center Cooling Optimization Software Product Offered

Table 113. Modine Manufacturing Company Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 114. Modine Manufacturing Company Main Business

Table 115. Modine Manufacturing Company Latest Developments

Table 116. Trane Technologies plc Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 117. Trane Technologies plc Data Center Cooling Optimization Software Product Offered

Table 118. Trane Technologies plc Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 119. Trane Technologies plc Main Business

Table 120. Trane Technologies plc Latest Developments

Table 121. Vertiv Holdings Co Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 122. Vertiv Holdings Co Data Center Cooling Optimization Software Product Offered

Table 123. Vertiv Holdings Co Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 124. Vertiv Holdings Co Main Business

Table 125. Vertiv Holdings Co Latest Developments

Table 126. Optimum Energy LLC Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 127. Optimum Energy LLC Data Center Cooling Optimization Software Product Offered

Table 128. Optimum Energy LLC Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 129. Optimum Energy LLC Main Business

Table 130. Optimum Energy LLC Latest Developments

Table 131. ZTE Corporation Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 132. ZTE Corporation Data Center Cooling Optimization Software Product Offered

Table 133. ZTE Corporation Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 134. ZTE Corporation Main Business

Table 135. ZTE Corporation Latest Developments

Table 136. Mitsubishi Electric Corporation Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 137. Mitsubishi Electric Corporation Data Center Cooling Optimization Software Product Offered

Table 138. Mitsubishi Electric Corporation Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 139. Mitsubishi Electric Corporation Main Business

Table 140. Mitsubishi Electric Corporation Latest Developments

Table 141. Delta Electronics, Inc. Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 142. Delta Electronics, Inc. Data Center Cooling Optimization Software Product

Offered

Table 143. Delta Electronics, Inc. Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 144. Delta Electronics, Inc. Main Business

Table 145. Delta Electronics, Inc. Latest Developments

Table 146. Johnson Controls International plc Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 147. Johnson Controls International plc Data Center Cooling Optimization Software Product Offered

Table 148. Johnson Controls International plc Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 149. Johnson Controls International plc Main Business

Table 150. Johnson Controls International plc Latest Developments

Table 151. Modius, Inc. Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 152. Modius, Inc. Data Center Cooling Optimization Software Product Offered

Table 153. Modius, Inc. Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 154. Modius, Inc. Main Business

Table 155. Modius, Inc. Latest Developments

Table 156. Sunbird Software, Inc. Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 157. Sunbird Software, Inc. Data Center Cooling Optimization Software Product Offered

Table 158. Sunbird Software, Inc. Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 159. Sunbird Software, Inc. Main Business

Table 160. Sunbird Software, Inc. Latest Developments

Table 161. Gamma Technologies, LLC Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 162. Gamma Technologies, LLC Data Center Cooling Optimization Software Product Offered

Table 163. Gamma Technologies, LLC Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 164. Gamma Technologies, LLC Main Business

Table 165. Gamma Technologies, LLC Latest Developments

Table 166. Red Dot AI Pte Ltd Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 167. Red Dot AI Pte Ltd Data Center Cooling Optimization Software Product

Offered

Table 168. Red Dot AI Pte Ltd Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 169. Red Dot AI Pte Ltd Main Business

Table 170. Red Dot AI Pte Ltd Latest Developments

Table 171. FNT GmbH Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 172. FNT GmbH Data Center Cooling Optimization Software Product Offered

Table 173. FNT GmbH Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 174. FNT GmbH Main Business

Table 175. FNT GmbH Latest Developments

Table 176. Shenzhen Envicool Technology Co., Ltd. Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 177. Shenzhen Envicool Technology Co., Ltd. Data Center Cooling Optimization Software Product Offered

Table 178. Shenzhen Envicool Technology Co., Ltd. Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 179. Shenzhen Envicool Technology Co., Ltd. Main Business

Table 180. Shenzhen Envicool Technology Co., Ltd. Latest Developments

Table 181. Lucend Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 182. Lucend Data Center Cooling Optimization Software Product Offered

Table 183. Lucend Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 184. Lucend Main Business

Table 185. Lucend Latest Developments

Table 186. ZutaCore, Inc. Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 187. ZutaCore, Inc. Data Center Cooling Optimization Software Product Offered

Table 188. ZutaCore, Inc. Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 189. ZutaCore, Inc. Main Business

Table 190. ZutaCore, Inc. Latest Developments

Table 191. OctaiPipe Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 192. OctaiPipe Data Center Cooling Optimization Software Product Offered

Table 193. OctaiPipe Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 194. OctaiPipe Main Business

Table 195. OctaiPipe Latest Developments

Table 196. FLUIX Inc. Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 197. FLUIX Inc. Data Center Cooling Optimization Software Product Offered

Table 198. FLUIX Inc. Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 199. FLUIX Inc. Main Business

Table 200. FLUIX Inc. Latest Developments

Table 201. Zhuhai Pilot Technology Co., Ltd. Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 202. Zhuhai Pilot Technology Co., Ltd. Data Center Cooling Optimization Software Product Offered

Table 203. Zhuhai Pilot Technology Co., Ltd. Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 204. Zhuhai Pilot Technology Co., Ltd. Main Business

Table 205. Zhuhai Pilot Technology Co., Ltd. Latest Developments

Table 206. Nanjing Canatal Data-Centre Environmental Tech Co., Ltd. Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 207. Nanjing Canatal Data-Centre Environmental Tech Co., Ltd. Data Center Cooling Optimization Software Product Offered

Table 208. Nanjing Canatal Data-Centre Environmental Tech Co., Ltd. Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 209. Nanjing Canatal Data-Centre Environmental Tech Co., Ltd. Main Business

Table 210. Nanjing Canatal Data-Centre Environmental Tech Co., Ltd. Latest Developments

Table 211. Beijing Jiamu Kerui Technology Co., Ltd. Details, Company Type, Data Center Cooling Optimization Software Area Served and Its Competitors

Table 212. Beijing Jiamu Kerui Technology Co., Ltd. Data Center Cooling Optimization Software Product Offered

Table 213. Beijing Jiamu Kerui Technology Co., Ltd. Data Center Cooling Optimization Software Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 214. Beijing Jiamu Kerui Technology Co., Ltd. Main Business

Table 215. Beijing Jiamu Kerui Technology Co., Ltd. Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Data Center Cooling Optimization Software Report Years Considered

Figure 2. Research Objectives

Figure 3. Research Methodology

Figure 4. Research Process and Data Source

Figure 5. Global Data Center Cooling Optimization Software Market Size Growth Rate (2021-2032) (\$ millions)

Figure 6. Data Center Cooling Optimization Software Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 7. Data Center Cooling Optimization Software Sales Market Share by Country/Region (2025)

Figure 8. Data Center Cooling Optimization Software Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 9. Global Data Center Cooling Optimization Software Market Size Market Share by Type in 2025

Figure 10. Global Data Center Cooling Optimization Software Market Size Market Share by Primary Cooling Domain in 2025

Figure 11. Global Data Center Cooling Optimization Software Market Size Market Share by Deployment Model in 2025

Figure 12. Data Center Cooling Optimization Software in Internet and Cloud Computing Industry

Figure 13. Global Data Center Cooling Optimization Software Market: Internet and Cloud Computing Industry (2021-2026) & (\$ millions)

Figure 14. Data Center Cooling Optimization Software in Finance and Banking

Figure 15. Global Data Center Cooling Optimization Software Market: Finance and Banking (2021-2026) & (\$ millions)

Figure 16. Data Center Cooling Optimization Software in Government and Public Computing Power

Figure 17. Global Data Center Cooling Optimization Software Market: Government and Public Computing Power (2021-2026) & (\$ millions)

Figure 18. Data Center Cooling Optimization Software in Others

Figure 19. Global Data Center Cooling Optimization Software Market: Others (2021-2026) & (\$ millions)

Figure 20. Global Data Center Cooling Optimization Software Market Size Market Share by Application in 2025

Figure 21. Global Data Center Cooling Optimization Software Revenue Market Share by

Player in 2025

Figure 22. Global Data Center Cooling Optimization Software Market Size Market Share by Region (2021-2026)

Figure 23. Americas Data Center Cooling Optimization Software Market Size 2021-2026 (\$ millions)

Figure 24. APAC Data Center Cooling Optimization Software Market Size 2021-2026 (\$ millions)

Figure 25. Europe Data Center Cooling Optimization Software Market Size 2021-2026 (\$ millions)

Figure 26. Middle East & Africa Data Center Cooling Optimization Software Market Size 2021-2026 (\$ millions)

Figure 27. Americas Data Center Cooling Optimization Software Value Market Share by Country in 2025

Figure 28. United States Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 29. Canada Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 30. Mexico Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 31. Brazil Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 32. APAC Data Center Cooling Optimization Software Market Size Market Share by Region in 2025

Figure 33. APAC Data Center Cooling Optimization Software Market Size Market Share by Type (2021-2026)

Figure 34. APAC Data Center Cooling Optimization Software Market Size Market Share by Application (2021-2026)

Figure 35. China Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 36. Japan Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 37. South Korea Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 38. Southeast Asia Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 39. India Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 40. Australia Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 41. Europe Data Center Cooling Optimization Software Market Size Market Share by Country in 2025

Figure 42. Europe Data Center Cooling Optimization Software Market Size Market Share by Type (2021-2026)

Figure 43. Europe Data Center Cooling Optimization Software Market Size Market Share by Application (2021-2026)

Figure 44. Germany Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 45. France Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 46. UK Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 47. Italy Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 48. Russia Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 49. Middle East & Africa Data Center Cooling Optimization Software Market Size Market Share by Region (2021-2026)

Figure 50. Middle East & Africa Data Center Cooling Optimization Software Market Size Market Share by Type (2021-2026)

Figure 51. Middle East & Africa Data Center Cooling Optimization Software Market Size Market Share by Application (2021-2026)

Figure 52. Egypt Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 53. South Africa Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 54. Israel Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 55. Turkey Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 56. GCC Countries Data Center Cooling Optimization Software Market Size Growth 2021-2026 (\$ millions)

Figure 57. Americas Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

Figure 58. APAC Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

Figure 59. Europe Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

Figure 60. Middle East & Africa Data Center Cooling Optimization Software Market Size

2027-2032 (\$ millions)

Figure 61. United States Data Center Cooling Optimization Software Market Size

2027-2032 (\$ millions)

Figure 62. Canada Data Center Cooling Optimization Software Market Size 2027-2032

(\$ millions)

Figure 63. Mexico Data Center Cooling Optimization Software Market Size 2027-2032

(\$ millions)

Figure 64. Brazil Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

Figure 65. China Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

Figure 66. Japan Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

Figure 67. Korea Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

Figure 68. Southeast Asia Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

Figure 69. India Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

Figure 70. Australia Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

Figure 71. Germany Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

Figure 72. France Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

Figure 73. UK Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

Figure 74. Italy Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

Figure 75. Russia Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

Figure 76. Egypt Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

Figure 77. South Africa Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

Figure 78. Israel Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

Figure 79. Turkey Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

Figure 80. Global Data Center Cooling Optimization Software Market Size Market Share Forecast by Type (2027-2032)

Figure 81. Global Data Center Cooling Optimization Software Market Size Market Share Forecast by Application (2027-2032)

Figure 82. GCC Countries Data Center Cooling Optimization Software Market Size 2027-2032 (\$ millions)

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