

Global Data Center Thermal Management Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Data Center Thermal Management market size is predicted to grow from US\$ 10159 million in 2025 to US\$ 24501 million in 2032; it is expected to grow at a CAGR of 13.5% from 2026 to 2032.

Data center thermal management refers to the process of effectively controlling and managing the heat generated during the operation of equipment within the data center, aiming to ensure the stable operation of the data center and the long-term reliability of the equipment. Since a large number of servers, storage devices and network equipment are integrated in the data center, these devices will generate a large amount of heat during operation. If the heat cannot be dissipated in a timely and effective manner, it may lead to a decrease in equipment performance, an increase in failure rate, and even a fire. and other security issues.

1. Rapid growth in data center capacity driven by cloud computing, AI, and high-performance workloads.

The accelerating adoption of cloud services, hyperscale computing, artificial intelligence (AI), machine learning (ML), and high-performance computing (HPC) is significantly increasing server density and rack power levels within data centers. Modern AI training clusters and GPU-based workloads often exceed 30–50 kW per rack, far above traditional enterprise data center designs. This rapid rise in heat density creates a critical need for advanced thermal management solutions, including precision air conditioning, liquid cooling, rear-door heat exchangers, and direct-to-chip cooling systems. As data centers scale both in size and computing intensity, effective thermal management becomes essential to maintain system reliability, reduce hardware failure rates, and ensure uninterrupted operations, directly driving demand across the data

center thermal management market.

2. Increasing energy efficiency requirements and pressure to reduce operating costs and carbon emissions.

Energy consumption related to cooling represents a substantial portion of total data center operating expenses, often accounting for 30–40% of overall power usage. Governments, regulators, and enterprise customers are placing growing emphasis on energy efficiency metrics such as Power Usage Effectiveness (PUE), carbon footprint reduction, and sustainability compliance. As a result, data center operators are investing in more efficient thermal management technologies, including free cooling, evaporative cooling, liquid immersion cooling, and AI-driven cooling optimization systems. These solutions help reduce electricity consumption, improve cooling efficiency, and support corporate net-zero and ESG targets, making energy-efficient thermal management a key market driver across hyperscale, colocation, and enterprise data centers.

3. Expansion of edge data centers and geographic diversification into high-temperature regions.

The global expansion of edge computing infrastructure and the construction of data centers in emerging markets and warmer climates are further accelerating demand for advanced thermal management solutions. Edge data centers are often deployed in compact spaces with limited airflow and higher ambient temperatures, creating unique cooling challenges compared to traditional centralized facilities. Additionally, rapid data center investments in regions such as Southeast Asia, the Middle East, India, and parts of Latin America require cooling systems capable of operating efficiently under extreme environmental conditions. These factors are driving the adoption of modular cooling units, liquid-based systems, and customized thermal management architectures designed for harsh or space-constrained environments, reinforcing long-term growth in the data center thermal management market.

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

This Insight Report provides a comprehensive analysis of the global Data Center Thermal Management 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 Thermal Management portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Data Center Thermal Management market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Data Center Thermal Management 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 Thermal Management.

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

Segmentation by Type:

Liquid Cooling

Air Cooling

Segmentation by Equipment:

Precision Air Conditioning System

Coolant Distribution Unit

Air Handling Unit

Other

Segmentation by Power:

High Power

Low Power

Segmentation by Application:

Small and Medium-Sized Data Center

Large Data Center

Hyper-Large Data Center

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.

Vertiv

Stulz

Schneider Electric

Rittal

Envicool

Johnson Controls

Mitsubishi Electric

Trane

Carrier

Shenling

YMK

Huawei

Boyd

Canatal

iTeaq

Airsys

Hairf

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 Thermal Management Market Size (2021-2032)
 - 2.1.2 Data Center Thermal Management Market Size CAGR by Region (2021 VS 2025 VS 2032)
 - 2.1.3 World Current & Future Analysis for Data Center Thermal Management by Country/Region (2021, 2025 & 2032)
- 2.2 Data Center Thermal Management Segment by Type
 - 2.2.1 Liquid Cooling
 - 2.2.2 Air Cooling
 - 2.2.3 Data Center Thermal Management Market Size by Type
 - 2.2.3.1 Data Center Thermal Management Market Size CAGR by Type (2021 VS 2025 VS 2032)
 - 2.2.3.2 Global Data Center Thermal Management Market Size Market Share by Type (2021-2026)
- 2.3 Data Center Thermal Management Segment by Equipment
 - 2.3.1 Precision Air Conditioning System
 - 2.3.2 Coolant Distribution Unit
 - 2.3.3 Air Handling Unit
 - 2.3.4 Other
 - 2.3.5 Data Center Thermal Management Market Size by Equipment
 - 2.3.5.1 Data Center Thermal Management Market Size CAGR by Equipment (2021 VS 2025 VS 2032)
 - 2.3.5.2 Global Data Center Thermal Management Market Size Market Share by Equipment (2021-2026)

2.4 Data Center Thermal Management Segment by Power

2.4.1 High Power

2.4.2 Low Power

2.4.3 Data Center Thermal Management Market Size by Power

2.4.3.1 Data Center Thermal Management Market Size CAGR by Power (2021 VS 2025 VS 2032)

2.4.3.2 Global Data Center Thermal Management Market Size Market Share by Power (2021-2026)

2.5 Data Center Thermal Management Segment by Application

2.5.1 Small and Medium-Sized Data Center

2.5.2 Large Data Center

2.5.3 Hyper-Large Data Center

2.5.4 Data Center Thermal Management Market Size by Application

2.5.4.1 Data Center Thermal Management Market Size CAGR by Application (2021 VS 2025 VS 2032)

2.5.4.2 Global Data Center Thermal Management Market Size Market Share by Application (2021-2026)

3 DATA CENTER THERMAL MANAGEMENT MARKET SIZE BY PLAYER

3.1 Data Center Thermal Management Market Size Market Share by Player

3.1.1 Global Data Center Thermal Management Revenue by Player (2021-2026)

3.1.2 Global Data Center Thermal Management Revenue Market Share by Player (2021-2026)

3.2 Global Data Center Thermal Management 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 THERMAL MANAGEMENT BY REGION

4.1 Data Center Thermal Management Market Size by Region (2021-2026)

4.2 Global Data Center Thermal Management Annual Revenue by Country/Region (2021-2026)

4.3 Americas Data Center Thermal Management Market Size Growth (2021-2026)

4.4 APAC Data Center Thermal Management Market Size Growth (2021-2026)

- 4.5 Europe Data Center Thermal Management Market Size Growth (2021-2026)
- 4.6 Middle East & Africa Data Center Thermal Management Market Size Growth (2021-2026)

5 AMERICAS

- 5.1 Americas Data Center Thermal Management Market Size by Country (2021-2026)
- 5.2 Americas Data Center Thermal Management Market Size by Type (2021-2026)
- 5.3 Americas Data Center Thermal Management 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 Thermal Management Market Size by Region (2021-2026)
- 6.2 APAC Data Center Thermal Management Market Size by Type (2021-2026)
- 6.3 APAC Data Center Thermal Management 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 Thermal Management Market Size by Country (2021-2026)
- 7.2 Europe Data Center Thermal Management Market Size by Type (2021-2026)
- 7.3 Europe Data Center Thermal Management 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 Thermal Management by Region (2021-2026)
- 8.2 Middle East & Africa Data Center Thermal Management Market Size by Type (2021-2026)
- 8.3 Middle East & Africa Data Center Thermal Management 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 THERMAL MANAGEMENT MARKET FORECAST

- 10.1 Global Data Center Thermal Management Forecast by Region (2027-2032)
 - 10.1.1 Global Data Center Thermal Management Forecast by Region (2027-2032)
 - 10.1.2 Americas Data Center Thermal Management Forecast
 - 10.1.3 APAC Data Center Thermal Management Forecast
 - 10.1.4 Europe Data Center Thermal Management Forecast
 - 10.1.5 Middle East & Africa Data Center Thermal Management Forecast
- 10.2 Americas Data Center Thermal Management Forecast by Country (2027-2032)
 - 10.2.1 United States Market Data Center Thermal Management Forecast
 - 10.2.2 Canada Market Data Center Thermal Management Forecast
 - 10.2.3 Mexico Market Data Center Thermal Management Forecast
 - 10.2.4 Brazil Market Data Center Thermal Management Forecast
- 10.3 APAC Data Center Thermal Management Forecast by Region (2027-2032)
 - 10.3.1 China Data Center Thermal Management Market Forecast
 - 10.3.2 Japan Market Data Center Thermal Management Forecast
 - 10.3.3 Korea Market Data Center Thermal Management Forecast
 - 10.3.4 Southeast Asia Market Data Center Thermal Management Forecast
 - 10.3.5 India Market Data Center Thermal Management Forecast
 - 10.3.6 Australia Market Data Center Thermal Management Forecast
- 10.4 Europe Data Center Thermal Management Forecast by Country (2027-2032)

- 10.4.1 Germany Market Data Center Thermal Management Forecast
- 10.4.2 France Market Data Center Thermal Management Forecast
- 10.4.3 UK Market Data Center Thermal Management Forecast
- 10.4.4 Italy Market Data Center Thermal Management Forecast
- 10.4.5 Russia Market Data Center Thermal Management Forecast
- 10.5 Middle East & Africa Data Center Thermal Management Forecast by Region (2027-2032)
 - 10.5.1 Egypt Market Data Center Thermal Management Forecast
 - 10.5.2 South Africa Market Data Center Thermal Management Forecast
 - 10.5.3 Israel Market Data Center Thermal Management Forecast
 - 10.5.4 Turkey Market Data Center Thermal Management Forecast
- 10.6 Global Data Center Thermal Management Forecast by Type (2027-2032)
- 10.7 Global Data Center Thermal Management Forecast by Application (2027-2032)
 - 10.7.1 GCC Countries Market Data Center Thermal Management Forecast

11 KEY PLAYERS ANALYSIS

11.1 Vertiv

- 11.1.1 Vertiv Company Information
- 11.1.2 Vertiv Data Center Thermal Management Product Offered
- 11.1.3 Vertiv Data Center Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
- 11.1.4 Vertiv Main Business Overview
- 11.1.5 Vertiv Latest Developments

11.2 Stulz

- 11.2.1 Stulz Company Information
- 11.2.2 Stulz Data Center Thermal Management Product Offered
- 11.2.3 Stulz Data Center Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
- 11.2.4 Stulz Main Business Overview
- 11.2.5 Stulz Latest Developments

11.3 Schneider Electric

- 11.3.1 Schneider Electric Company Information
- 11.3.2 Schneider Electric Data Center Thermal Management Product Offered
- 11.3.3 Schneider Electric Data Center Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
- 11.3.4 Schneider Electric Main Business Overview
- 11.3.5 Schneider Electric Latest Developments

11.4 Rittal

- 11.4.1 Rittal Company Information
- 11.4.2 Rittal Data Center Thermal Management Product Offered
- 11.4.3 Rittal Data Center Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
- 11.4.4 Rittal Main Business Overview
- 11.4.5 Rittal Latest Developments
- 11.5 Envicool
 - 11.5.1 Envicool Company Information
 - 11.5.2 Envicool Data Center Thermal Management Product Offered
 - 11.5.3 Envicool Data Center Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 11.5.4 Envicool Main Business Overview
 - 11.5.5 Envicool Latest Developments
- 11.6 Johnson Controls
 - 11.6.1 Johnson Controls Company Information
 - 11.6.2 Johnson Controls Data Center Thermal Management Product Offered
 - 11.6.3 Johnson Controls Data Center Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 11.6.4 Johnson Controls Main Business Overview
 - 11.6.5 Johnson Controls Latest Developments
- 11.7 Mitsubishi Electric
 - 11.7.1 Mitsubishi Electric Company Information
 - 11.7.2 Mitsubishi Electric Data Center Thermal Management Product Offered
 - 11.7.3 Mitsubishi Electric Data Center Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 11.7.4 Mitsubishi Electric Main Business Overview
 - 11.7.5 Mitsubishi Electric Latest Developments
- 11.8 Trane
 - 11.8.1 Trane Company Information
 - 11.8.2 Trane Data Center Thermal Management Product Offered
 - 11.8.3 Trane Data Center Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 11.8.4 Trane Main Business Overview
 - 11.8.5 Trane Latest Developments
- 11.9 Carrier
 - 11.9.1 Carrier Company Information
 - 11.9.2 Carrier Data Center Thermal Management Product Offered
 - 11.9.3 Carrier Data Center Thermal Management Revenue, Gross Margin and Market Share (2021-2026)

- 11.9.4 Carrier Main Business Overview
- 11.9.5 Carrier Latest Developments
- 11.10 Shenling
 - 11.10.1 Shenling Company Information
 - 11.10.2 Shenling Data Center Thermal Management Product Offered
 - 11.10.3 Shenling Data Center Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 11.10.4 Shenling Main Business Overview
 - 11.10.5 Shenling Latest Developments
- 11.11 YMK
 - 11.11.1 YMK Company Information
 - 11.11.2 YMK Data Center Thermal Management Product Offered
 - 11.11.3 YMK Data Center Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 11.11.4 YMK Main Business Overview
 - 11.11.5 YMK Latest Developments
- 11.12 Huawei
 - 11.12.1 Huawei Company Information
 - 11.12.2 Huawei Data Center Thermal Management Product Offered
 - 11.12.3 Huawei Data Center Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 11.12.4 Huawei Main Business Overview
 - 11.12.5 Huawei Latest Developments
- 11.13 Boyd
 - 11.13.1 Boyd Company Information
 - 11.13.2 Boyd Data Center Thermal Management Product Offered
 - 11.13.3 Boyd Data Center Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 11.13.4 Boyd Main Business Overview
 - 11.13.5 Boyd Latest Developments
- 11.14 Canatal
 - 11.14.1 Canatal Company Information
 - 11.14.2 Canatal Data Center Thermal Management Product Offered
 - 11.14.3 Canatal Data Center Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 11.14.4 Canatal Main Business Overview
 - 11.14.5 Canatal Latest Developments
- 11.15 iTeq
 - 11.15.1 iTeq Company Information

- 11.15.2 iTeaq Data Center Thermal Management Product Offered
- 11.15.3 iTeaq Data Center Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
- 11.15.4 iTeaq Main Business Overview
- 11.15.5 iTeaq Latest Developments
- 11.16 Airsys
 - 11.16.1 Airsys Company Information
 - 11.16.2 Airsys Data Center Thermal Management Product Offered
 - 11.16.3 Airsys Data Center Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 11.16.4 Airsys Main Business Overview
 - 11.16.5 Airsys Latest Developments
- 11.17 Hairf
 - 11.17.1 Hairf Company Information
 - 11.17.2 Hairf Data Center Thermal Management Product Offered
 - 11.17.3 Hairf Data Center Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 11.17.4 Hairf Main Business Overview
 - 11.17.5 Hairf Latest Developments

12 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

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

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

Table 3. Major Players of Liquid Cooling

Table 4. Major Players of Air Cooling

Table 5. Data Center Thermal Management Market Size CAGR by Type (2021 VS 2025 VS 2032) & (\$ millions)

Table 6. Global Data Center Thermal Management Market Size by Type (2021-2026) & (\$ millions)

Table 7. Global Data Center Thermal Management Market Size Market Share by Type (2021-2026)

Table 8. Major Players of Precision Air Conditioning System

Table 9. Major Players of Coolant Distribution Unit

Table 10. Major Players of Air Handling Unit

Table 11. Major Players of Other

Table 12. Data Center Thermal Management Market Size CAGR by Equipment (2021 VS 2025 VS 2032) & (\$ millions)

Table 13. Global Data Center Thermal Management Market Size by Equipment (2021-2026) & (\$ millions)

Table 14. Global Data Center Thermal Management Market Size Market Share by Equipment (2021-2026)

Table 15. Major Players of High Power

Table 16. Major Players of Low Power

Table 17. Data Center Thermal Management Market Size CAGR by Power (2021 VS 2025 VS 2032) & (\$ millions)

Table 18. Global Data Center Thermal Management Market Size by Power (2021-2026) & (\$ millions)

Table 19. Global Data Center Thermal Management Market Size Market Share by Power (2021-2026)

Table 20. Data Center Thermal Management Market Size CAGR by Application (2021 VS 2025 VS 2032) & (\$ millions)

Table 21. Global Data Center Thermal Management Market Size by Application (2021-2026) & (\$ millions)

Table 22. Global Data Center Thermal Management Market Size Market Share by

Application (2021-2026)

Table 23. Global Data Center Thermal Management Revenue by Player (2021-2026) & (\$ millions)

Table 24. Global Data Center Thermal Management Revenue Market Share by Player (2021-2026)

Table 25. Data Center Thermal Management Key Players Head office and Products Offered

Table 26. Data Center Thermal Management Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 27. New Products and Potential Entrants

Table 28. Mergers & Acquisitions, Expansion

Table 29. Global Data Center Thermal Management Market Size by Region (2021-2026) & (\$ millions)

Table 30. Global Data Center Thermal Management Market Size Market Share by Region (2021-2026)

Table 31. Global Data Center Thermal Management Revenue by Country/Region (2021-2026) & (\$ millions)

Table 32. Global Data Center Thermal Management Revenue Market Share by Country/Region (2021-2026)

Table 33. Americas Data Center Thermal Management Market Size by Country (2021-2026) & (\$ millions)

Table 34. Americas Data Center Thermal Management Market Size Market Share by Country (2021-2026)

Table 35. Americas Data Center Thermal Management Market Size by Type (2021-2026) & (\$ millions)

Table 36. Americas Data Center Thermal Management Market Size Market Share by Type (2021-2026)

Table 37. Americas Data Center Thermal Management Market Size by Application (2021-2026) & (\$ millions)

Table 38. Americas Data Center Thermal Management Market Size Market Share by Application (2021-2026)

Table 39. APAC Data Center Thermal Management Market Size by Region (2021-2026) & (\$ millions)

Table 40. APAC Data Center Thermal Management Market Size Market Share by Region (2021-2026)

Table 41. APAC Data Center Thermal Management Market Size by Type (2021-2026) & (\$ millions)

Table 42. APAC Data Center Thermal Management Market Size by Application (2021-2026) & (\$ millions)

Table 43. Europe Data Center Thermal Management Market Size by Country (2021-2026) & (\$ millions)

Table 44. Europe Data Center Thermal Management Market Size Market Share by Country (2021-2026)

Table 45. Europe Data Center Thermal Management Market Size by Type (2021-2026) & (\$ millions)

Table 46. Europe Data Center Thermal Management Market Size by Application (2021-2026) & (\$ millions)

Table 47. Middle East & Africa Data Center Thermal Management Market Size by Region (2021-2026) & (\$ millions)

Table 48. Middle East & Africa Data Center Thermal Management Market Size by Type (2021-2026) & (\$ millions)

Table 49. Middle East & Africa Data Center Thermal Management Market Size by Application (2021-2026) & (\$ millions)

Table 50. Key Market Drivers & Growth Opportunities of Data Center Thermal Management

Table 51. Key Market Challenges & Risks of Data Center Thermal Management

Table 52. Key Industry Trends of Data Center Thermal Management

Table 53. Global Data Center Thermal Management Market Size Forecast by Region (2027-2032) & (\$ millions)

Table 54. Global Data Center Thermal Management Market Size Market Share Forecast by Region (2027-2032)

Table 55. Global Data Center Thermal Management Market Size Forecast by Type (2027-2032) & (\$ millions)

Table 56. Global Data Center Thermal Management Market Size Forecast by Application (2027-2032) & (\$ millions)

Table 57. Vertiv Details, Company Type, Data Center Thermal Management Area Served and Its Competitors

Table 58. Vertiv Data Center Thermal Management Product Offered

Table 59. Vertiv Data Center Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 60. Vertiv Main Business

Table 61. Vertiv Latest Developments

Table 62. Stulz Details, Company Type, Data Center Thermal Management Area Served and Its Competitors

Table 63. Stulz Data Center Thermal Management Product Offered

Table 64. Stulz Data Center Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 65. Stulz Main Business

Table 66. Stulz Latest Developments

Table 67. Schneider Electric Details, Company Type, Data Center Thermal Management Area Served and Its Competitors

Table 68. Schneider Electric Data Center Thermal Management Product Offered

Table 69. Schneider Electric Data Center Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 70. Schneider Electric Main Business

Table 71. Schneider Electric Latest Developments

Table 72. Rittal Details, Company Type, Data Center Thermal Management Area Served and Its Competitors

Table 73. Rittal Data Center Thermal Management Product Offered

Table 74. Rittal Data Center Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 75. Rittal Main Business

Table 76. Rittal Latest Developments

Table 77. Envicool Details, Company Type, Data Center Thermal Management Area Served and Its Competitors

Table 78. Envicool Data Center Thermal Management Product Offered

Table 79. Envicool Data Center Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 80. Envicool Main Business

Table 81. Envicool Latest Developments

Table 82. Johnson Controls Details, Company Type, Data Center Thermal Management Area Served and Its Competitors

Table 83. Johnson Controls Data Center Thermal Management Product Offered

Table 84. Johnson Controls Data Center Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 85. Johnson Controls Main Business

Table 86. Johnson Controls Latest Developments

Table 87. Mitsubishi Electric Details, Company Type, Data Center Thermal Management Area Served and Its Competitors

Table 88. Mitsubishi Electric Data Center Thermal Management Product Offered

Table 89. Mitsubishi Electric Data Center Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 90. Mitsubishi Electric Main Business

Table 91. Mitsubishi Electric Latest Developments

Table 92. Trane Details, Company Type, Data Center Thermal Management Area Served and Its Competitors

Table 93. Trane Data Center Thermal Management Product Offered

- Table 94. Trane Data Center Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)
- Table 95. Trane Main Business
- Table 96. Trane Latest Developments
- Table 97. Carrier Details, Company Type, Data Center Thermal Management Area Served and Its Competitors
- Table 98. Carrier Data Center Thermal Management Product Offered
- Table 99. Carrier Data Center Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)
- Table 100. Carrier Main Business
- Table 101. Carrier Latest Developments
- Table 102. Shenling Details, Company Type, Data Center Thermal Management Area Served and Its Competitors
- Table 103. Shenling Data Center Thermal Management Product Offered
- Table 104. Shenling Data Center Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)
- Table 105. Shenling Main Business
- Table 106. Shenling Latest Developments
- Table 107. YMK Details, Company Type, Data Center Thermal Management Area Served and Its Competitors
- Table 108. YMK Data Center Thermal Management Product Offered
- Table 109. YMK Data Center Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)
- Table 110. YMK Main Business
- Table 111. YMK Latest Developments
- Table 112. Huawei Details, Company Type, Data Center Thermal Management Area Served and Its Competitors
- Table 113. Huawei Data Center Thermal Management Product Offered
- Table 114. Huawei Data Center Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)
- Table 115. Huawei Main Business
- Table 116. Huawei Latest Developments
- Table 117. Boyd Details, Company Type, Data Center Thermal Management Area Served and Its Competitors
- Table 118. Boyd Data Center Thermal Management Product Offered
- Table 119. Boyd Data Center Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)
- Table 120. Boyd Main Business
- Table 121. Boyd Latest Developments

Table 122. Canatal Details, Company Type, Data Center Thermal Management Area Served and Its Competitors

Table 123. Canatal Data Center Thermal Management Product Offered

Table 124. Canatal Data Center Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 125. Canatal Main Business

Table 126. Canatal Latest Developments

Table 127. iTeaq Details, Company Type, Data Center Thermal Management Area Served and Its Competitors

Table 128. iTeaq Data Center Thermal Management Product Offered

Table 129. iTeaq Data Center Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 130. iTeaq Main Business

Table 131. iTeaq Latest Developments

Table 132. Airsys Details, Company Type, Data Center Thermal Management Area Served and Its Competitors

Table 133. Airsys Data Center Thermal Management Product Offered

Table 134. Airsys Data Center Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 135. Airsys Main Business

Table 136. Airsys Latest Developments

Table 137. Hairf Details, Company Type, Data Center Thermal Management Area Served and Its Competitors

Table 138. Hairf Data Center Thermal Management Product Offered

Table 139. Hairf Data Center Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 140. Hairf Main Business

Table 141. Hairf Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Data Center Thermal Management Report Years Considered

Figure 2. Research Objectives

Figure 3. Research Methodology

Figure 4. Research Process and Data Source

Figure 5. Global Data Center Thermal Management Market Size Growth Rate (2021-2032) (\$ millions)

Figure 6. Data Center Thermal Management Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 7. Data Center Thermal Management Sales Market Share by Country/Region (2025)

Figure 8. Data Center Thermal Management Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 9. Global Data Center Thermal Management Market Size Market Share by Type in 2025

Figure 10. Global Data Center Thermal Management Market Size Market Share by Equipment in 2025

Figure 11. Global Data Center Thermal Management Market Size Market Share by Power in 2025

Figure 12. Data Center Thermal Management in Small and Medium-Sized Data Center

Figure 13. Global Data Center Thermal Management Market: Small and Medium-Sized Data Center (2021-2026) & (\$ millions)

Figure 14. Data Center Thermal Management in Large Data Center

Figure 15. Global Data Center Thermal Management Market: Large Data Center (2021-2026) & (\$ millions)

Figure 16. Data Center Thermal Management in Hyper-Large Data Center

Figure 17. Global Data Center Thermal Management Market: Hyper-Large Data Center (2021-2026) & (\$ millions)

Figure 18. Global Data Center Thermal Management Market Size Market Share by Application in 2025

Figure 19. Global Data Center Thermal Management Revenue Market Share by Player in 2025

Figure 20. Global Data Center Thermal Management Market Size Market Share by Region (2021-2026)

Figure 21. Americas Data Center Thermal Management Market Size 2021-2026 (\$ millions)

Figure 22. APAC Data Center Thermal Management Market Size 2021-2026 (\$ millions)

Figure 23. Europe Data Center Thermal Management Market Size 2021-2026 (\$ millions)

Figure 24. Middle East & Africa Data Center Thermal Management Market Size 2021-2026 (\$ millions)

Figure 25. Americas Data Center Thermal Management Value Market Share by Country in 2025

Figure 26. United States Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 27. Canada Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 28. Mexico Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 29. Brazil Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 30. APAC Data Center Thermal Management Market Size Market Share by Region in 2025

Figure 31. APAC Data Center Thermal Management Market Size Market Share by Type (2021-2026)

Figure 32. APAC Data Center Thermal Management Market Size Market Share by Application (2021-2026)

Figure 33. China Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 34. Japan Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 35. South Korea Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 36. Southeast Asia Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 37. India Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 38. Australia Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 39. Europe Data Center Thermal Management Market Size Market Share by Country in 2025

Figure 40. Europe Data Center Thermal Management Market Size Market Share by Type (2021-2026)

Figure 41. Europe Data Center Thermal Management Market Size Market Share by Application (2021-2026)

Figure 42. Germany Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 43. France Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 44. UK Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 45. Italy Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 46. Russia Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 47. Middle East & Africa Data Center Thermal Management Market Size Market Share by Region (2021-2026)

Figure 48. Middle East & Africa Data Center Thermal Management Market Size Market Share by Type (2021-2026)

Figure 49. Middle East & Africa Data Center Thermal Management Market Size Market Share by Application (2021-2026)

Figure 50. Egypt Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 51. South Africa Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 52. Israel Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 53. Turkey Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 54. GCC Countries Data Center Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 55. Americas Data Center Thermal Management Market Size 2027-2032 (\$ millions)

Figure 56. APAC Data Center Thermal Management Market Size 2027-2032 (\$ millions)

Figure 57. Europe Data Center Thermal Management Market Size 2027-2032 (\$ millions)

Figure 58. Middle East & Africa Data Center Thermal Management Market Size 2027-2032 (\$ millions)

Figure 59. United States Data Center Thermal Management Market Size 2027-2032 (\$ millions)

Figure 60. Canada Data Center Thermal Management Market Size 2027-2032 (\$ millions)

Figure 61. Mexico Data Center Thermal Management Market Size 2027-2032 (\$ millions)

- Figure 62. Brazil Data Center Thermal Management Market Size 2027-2032 (\$ millions)
- Figure 63. China Data Center Thermal Management Market Size 2027-2032 (\$ millions)
- Figure 64. Japan Data Center Thermal Management Market Size 2027-2032 (\$ millions)
- Figure 65. Korea Data Center Thermal Management Market Size 2027-2032 (\$ millions)
- Figure 66. Southeast Asia Data Center Thermal Management Market Size 2027-2032 (\$ millions)
- Figure 67. India Data Center Thermal Management Market Size 2027-2032 (\$ millions)
- Figure 68. Australia Data Center Thermal Management Market Size 2027-2032 (\$ millions)
- Figure 69. Germany Data Center Thermal Management Market Size 2027-2032 (\$ millions)
- Figure 70. France Data Center Thermal Management Market Size 2027-2032 (\$ millions)
- Figure 71. UK Data Center Thermal Management Market Size 2027-2032 (\$ millions)
- Figure 72. Italy Data Center Thermal Management Market Size 2027-2032 (\$ millions)
- Figure 73. Russia Data Center Thermal Management Market Size 2027-2032 (\$ millions)
- Figure 74. Egypt Data Center Thermal Management Market Size 2027-2032 (\$ millions)
- Figure 75. South Africa Data Center Thermal Management Market Size 2027-2032 (\$ millions)
- Figure 76. Israel Data Center Thermal Management Market Size 2027-2032 (\$ millions)
- Figure 77. Turkey Data Center Thermal Management Market Size 2027-2032 (\$ millions)
- Figure 78. Global Data Center Thermal Management Market Size Market Share Forecast by Type (2027-2032)
- Figure 79. Global Data Center Thermal Management Market Size Market Share Forecast by Application (2027-2032)
- Figure 80. GCC Countries Data Center Thermal Management Market Size 2027-2032 (\$ millions)

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