

Global Dry Cooler for Data Center Market Growth 2026-2032

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Abstracts

The global Dry Cooler for Data Center market size is predicted to grow from US\$ 2889 million in 2025 to US\$ 6273 million in 2032; it is expected to grow at a CAGR of 12.3% from 2026 to 2032.

A dry cooler for data centers is an air-cooled heat exchange device utilized within data center cooling systems for heat dissipation. Typically, it comprises finned-tube heat exchangers, low-noise fans, a structural framework, spray or adiabatic pre-cooling modules, a control system, and anti-freeze protection components. Its primary function is to expel heat generated by server operations?circulating through chilled water, glycol solutions, or liquid cooling loops?into the outdoor environment. Furthermore, under suitable climatic conditions, it serves to reduce the operating duration of compressor-based refrigeration systems, thereby enhancing the energy efficiency of the data center. Based on global estimates, the sales volume of data center dry coolers is projected to reach approximately 69,000 units in 2025, with an average unit price of approximately \$42,800. The industry's average capacity utilization rate is estimated at around 76%. Upstream enterprises in this sector primarily specialize in copper tubing, aluminum fins, galvanized steel sheets, stainless steel frameworks, axial fans, electric motors, variable frequency drives (VFDs), controllers, valves, water pumps, sensors, and anti-corrosion coatings. Downstream enterprises mainly operate within the fields of cloud computing data centers, internet data centers, financial data centers, telecommunications operator data centers, AI computing centers, enterprise-owned server rooms, and liquid cooling system integration. The industry's average gross profit margin stands at approximately 29%. Regarding the product cost structure, the heat exchanger core accounts for approximately 32%; fans, motors, and variable frequency control components account for about 18%; the steel framework and enclosure account for roughly 14%; control systems, valves, and sensors account for about 9%; pre-cooling and anti-freeze

components account for about 8%; manufacturing labor costs account for about 7%; transportation, installation, and testing account for about 6%; and R&D, certification, and quality management account for about 6%. Downstream demand drivers include heat dissipation requirements for AI computing centers, cooling requirements for high-density servers, external heat rejection requirements for liquid cooling systems, energy-saving retrofitting needs for chilled water systems, construction requirements for low-energy data centers, capacity expansion needs for telecommunications operator server rooms, and replacement requirements for existing server rooms. Key downstream customers include Amazon Web Services (AWS), Microsoft, Google, Meta, Equinix, Digital Realty, NTT Global Data Centers, China Mobile, China Telecom, China Unicom, Tencent Cloud, Alibaba Cloud, ByteDance, and Huawei Cloud, among others. Business opportunities primarily stem from tightening green data center policies and energy efficiency standards across various nations; the increased thermal management demands resulting from the rising power consumption of AI training and inference servers; the accelerating adoption of combined liquid cooling and dry cooler solutions; and a shift in customer priorities?moving away from a sole focus on cooling capacity toward demands for lower energy and water consumption, reduced noise levels, enhanced reliability, and optimized total lifecycle operational and maintenance costs.

Market opportunities for dry coolers in data centers are shifting from their traditional role as auxiliary equipment for standard server rooms to becoming critical heat rejection units within AI-centric data centers and liquid cooling systems. As the power density per server cabinet escalates from 10 kW or 20 kW to 60 kW?or even exceeding 100 kW?traditional cooling solutions centered on compressor-based refrigeration face mounting pressure regarding energy consumption, spatial requirements, and operational costs. Consequently, dry coolers?characterized by their relatively simple structure, lower maintenance costs, ability to leverage natural cooling sources, and compatibility with both cold-plate and immersion-based liquid cooling systems?are emerging as a preferred choice for both energy-efficiency retrofits and new construction projects in large-scale data centers. In 2025, the regions expected to witness the most rapid growth in demand include North America, Europe, China, the Middle East, and Southeast Asia. Among these, North America is driven most significantly by the construction of AI computing clusters; Europe places a greater emphasis on designs that minimize energy and water consumption; and China maintains robust procurement demand, bolstered by initiatives such as the 'Eastern Data, Western Computing' project, the development of intelligent computing centers, and the expansion of cloud resources by telecommunications operators. Industry competition will center on key factors such as heat exchange efficiency, fan energy consumption, noise control, corrosion

resistance, modular delivery capabilities, adaptability to extreme climates, and synergistic design with liquid cooling systems; manufacturers possessing prior experience in data center projects and global delivery capabilities are best positioned to secure orders from top-tier clients. Looking ahead, dry coolers will not completely displace cooling towers or chillers; however, their adoption rate is expected to rise significantly in environments featuring high-density server cabinets, water-scarce regions, cold-climate zones, and data centers prioritizing a low Power Usage Effectiveness (PUE). Given the large physical dimensions of the products, high transportation costs, and the highly customized nature of data center projects, localized manufacturing and regional service capabilities will become critical competitive differentiators. The industry is expected to demonstrate strong resilience in terms of order volume; however, pricing is likely to remain susceptible to cost fluctuations in raw materials—specifically steel, copper, and aluminum—as well as fan components.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Dry Cooler for Data Center and breaks down the forecast by Capacity, 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 Dry Cooler for Data Center.

This report presents a comprehensive overview, market shares, and growth opportunities of Dry Cooler for Data Center market by product type, application, key

manufacturers and key regions and countries.

Segmentation by Capacity:

?500KW

500-1000KW

1000-2000KW

?2000KW

Segmentation by Casing Material:

Stainless Steel Casing

Aluminum Casing

Other

Segmentation by Fin Material:

Aluminum Fins

Copper Fins

Other

Segmentation by Application:

Tire 3 Data Center

Tire 4 Data Center

Other

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 analysing the company's coverage, product portfolio, its market penetration.

Carrier (US)

TICA (CN)

DCX (PL)

Vertiv (US)

Alfa Laval (SE)

Kaltra (DE)

Stefani (IT)

Airedale (Modine) (GB)

Trane (IE/US)

Kelvion (DE)

Thermofin (DE)

Piovan Group (IT)

Baltimore Aircoil Company, Inc. (US)

Guntner (DE)

Envicool (CN)

Square Technology Group (CN)

Haiwu (CN)

Guangdong Shenling Environmental Systems (CN)

Key Questions Addressed in this Report

What is the 10-year outlook for the global Dry Cooler for Data Center market?

What factors are driving Dry Cooler for Data Center market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Dry Cooler for Data Center market opportunities vary by end market size?

How does Dry Cooler for Data Center break out by Capacity, by Application?

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