

Global Natural Cooling Air-Cooled Chiller Units Market Growth 2026-2032

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Abstracts

The global Natural Cooling Air-Cooled Chiller Units market size is predicted to grow from US\$ 745 million in 2025 to US\$ 1098 million in 2032; it is expected to grow at a CAGR of 5.8% from 2026 to 2032.

Naturally cooled air-cooled chillers are high-efficiency and energy-saving industrial chiller equipment. They utilize cool outdoor air to directly cool water in low ambient temperatures, thus partially or completely shutting down the compressor, significantly reducing operating energy consumption. They are particularly suitable for year-round cooling scenarios such as data centers and industrial refrigeration. These units are typically equipped with special natural cooling coils, automatic bypass valves, and intelligent control systems that can automatically switch between three modes: 'compressor full cooling,' 'compressor and natural cooling mixed,' and 'completely natural cooling' based on outdoor temperature. They offer advantages such as easy installation, water saving, and low operating and maintenance costs.

The upstream core components of naturally cooled air-cooled chillers include compressors, natural cooling plate heat exchangers, electronic expansion valves, four-way reversing valves, frequency converters, PLC control systems, temperature/pressure sensors, and intelligent group control modules. Downstream demand is highly concentrated in high-energy-consumption, year-round operating, and PUE-sensitive scenarios.

In 2025, global sales of naturally cooled air-cooled chillers reached 22,800 units, with a production capacity of approximately 30,500 units. The average selling price was US\$33,400 per unit, and the average gross profit margin was 28%-35%.

The market supply of natural-cooled air-cooled chillers is relatively fragmented. European, American, and Japanese manufacturers dominate the high-end market due to their mature technologies, energy-saving control systems, and high-end customization capabilities, particularly in data centers and large commercial buildings. Chinese manufacturers have advantages in cost and production capacity, rapidly expanding their market share through localized production and project experience. Overall, market concentration is moderate, but technological barriers and energy efficiency standards remain key barriers to entry into the high-end market.

Demand for natural-cooled air-cooled chillers primarily comes from high-energy-consuming buildings, commercial complexes, data centers, and industrial plants. High-temperature or dry regions have a high acceptance of natural cooling, which effectively reduces cooling energy consumption. Data centers and office buildings are adopting natural-cooled chillers extensively due to energy-saving, green building standards, and low operating cost requirements. Industrial plants and precision manufacturing scenarios are also seeing increased applications due to temperature control and energy efficiency requirements. Overall demand shows a trend towards energy conservation and emission reduction, and peak load optimization.

Technological development of natural-cooled air-cooled chillers is trending towards intelligent control, full frequency conversion, modularization, and high-efficiency heat exchange. The unit uses variable frequency drives to control the fan and compressor, enabling on-demand adjustment; the intelligent control system can perform load forecasting and energy consumption optimization; the modular unit facilitates combination and expansion, adapting to different building and industrial loads; the natural cooling function combined with a high-efficiency heat exchanger can reduce the use of mechanical refrigeration in low-temperature or nighttime environments, thereby saving energy and reducing consumption. Future development will further incorporate low-GWP environmentally friendly refrigerants and remote monitoring technology.

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

This Insight Report provides a comprehensive analysis of the global Natural Cooling Air-

Cooled Chiller Units 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 Natural Cooling Air-Cooled Chiller Units portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Natural Cooling Air-Cooled Chiller Units market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Natural Cooling Air-Cooled Chiller Units 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 Natural Cooling Air-Cooled Chiller Units.

This report presents a comprehensive overview, market shares, and growth opportunities of Natural Cooling Air-Cooled Chiller Units market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Cooling Capacity <200kW

Cooling Capacity 200-800kW

Cooling Capacity >800kW

Segmentation by Compressor Technology:

Vortex Type

Screw Type

Magnetic Levitation

Segmentation by Installation Configuration:

Standalone

Modular

Segmentation by Application:

Data Centers

Commercial Buildings

Medical Facilities

Industrial Manufacturing

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

Carrier

Trane

Johnson Controls

Daikin

Climaveneta

McQuay

Smardt

Shenling Environment

Kaltra

Airedale

Swegon

Mitsubishi Electric

Shenzhen Simpsan

Gree

Multistack

Midea

LG Electronics

Key Questions Addressed in this Report

What is the 10-year outlook for the global Natural Cooling Air-Cooled Chiller Units market?

What factors are driving Natural Cooling Air-Cooled Chiller Units market growth, globally and by region?

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

How do Natural Cooling Air-Cooled Chiller Units market opportunities vary by end market size?

How does Natural Cooling Air-Cooled Chiller Units break out by Type, by Application?

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