

Data Center Air Handling Units Market by Type, Capacity (?5,000 M3/H, 5,001-15,000 M3/H, 15,001-30,000 M3/H, 30,001-50,000 M3/H, ?50,001 M3/H), Data Center Type (Hyperscale, Enterprise, Colocation Providers), and Region - Global Forecast to 2032

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Abstracts

The data center air handling units market is projected to grow from USD 4.00 billion in 2026 to USD 6.70 billion by 2032, at a CAGR of 9.0% during the forecast period. The increasing adoption of artificial intelligence (AI), generative AI, high-performance computing (HPC), and cloud computing is the primary driver of the global data center air handling units market. AI servers equipped with advanced GPUs and accelerators from companies such as NVIDIA, AMD, and Intel generate substantially higher heat loads than conventional server architectures, pushing rack power densities from traditional 5–15 kW to 50–100 kW and, in some AI deployments, beyond 150 kW per rack. These elevated thermal loads require advanced thermal management solutions that can efficiently dissipate heat while ensuring continuous system reliability and performance.

“By type, the AHU integrated with chilled water systems segment is estimated to account for the largest, in terms of value, during the forecast period.”

The AHU integrated with chilled water systems segment is projected to account for the largest market share due to increasing adoption of chilled water-based cooling in hyperscale, colocation, and enterprise data centers. Chilled water-based cooling provides high efficiency and high-scale cooling.

An ongoing trend is the proliferation of hyperscale data centers and AI-enabled

computing infrastructure, which is also driving the use of chilled water systems with AHUs. Higher rack power densities across data centers are prompting operators to embrace a centralized chilled water-cooling architecture that can effectively remove heat from the entire facility. Furthermore, such systems can incorporate other emerging technologies such as variable-speed pumps, intelligent controls, free cooling schemes, and highly efficient chillers for enhanced efficiency.

“By data center type, the hyperscale data centers segment is projected to witness the highest CAGR during the forecast period.”

Based on data center type, the hyperscale data centers segment is projected to register the fastest growth in the global data center air handling units market during the forecast period. Large cloud service providers and technology companies are rapidly deploying hyperscale data centers to cater to the soaring demand for digital workloads. As the utilization of AI/ML, HPC and cloud-based applications increases, there is a need for more sophisticated cooling infrastructures. AHUs, along with chilled water systems, free cooling, intelligent controls and variable-speed fans, are all being employed to control increased BTU loads with lower overall energy consumption. Hydrogen and methane-based nuclear cell-powered hyperscale operators are also offering an environmentally sustainable approach to data center development and operation via the deployment of highly energy-efficient HVAC components and systems to achieve 1.2PUE standards.

“By capacity, the >50,000 M3/H segment is the highest growth during the forecast period.”

In terms of capacity, the above >50,000 m³/h segment is projected to grow at the highest CAGR in the overall data center air handling units market during the forecast period. The growth of this segment can be attributed to high demand for AHUs having airflow capacity of above 50,000 m³/h due to the rapid growth of hyperscale data centers, large colocation facilities, and AI-focused computing infrastructure.

With increasing applications to AI/ML/HPC and cloud-based applications, the use of large-capacity air handling units (AHUs) is being further promoted. AHUs of this capacity increasingly feature chilled water cooling, free cooling, EC fans, variable air volume for cooling/heating, and intelligent monitoring systems.

“North America is projected to be the largest data center air handling units market, in terms of value, during the forecast period.”

North America is estimated to be the largest market for data center air handling units during the forecast period. This growth is primarily driven by its established digital infrastructure, a significant presence of hyperscale cloud providers, and the rapid increase in artificial intelligence (AI) and high-performance computing (HPC) workloads. The US and Canada continue to experience significant investment in hyperscale, colocation, and enterprise data centers. Companies like Amazon Web Services (AWS), Microsoft, Google, Meta, Oracle, and CoreWeave are expanding their AI-ready infrastructures. As more high-density server racks and GPU clusters are implemented, thermal loads are increasing, which in turn raises the demand for enhanced thermal management solutions across the region.

Moreover, the region is at the forefront of developing next-generation cooling technologies. These include direct-to-chip liquid cooling, immersion cooling, precision air conditioning, computer room air handlers (CRAHs), computer room air conditioners (CRACs), coolant distribution units (CDUs), heat exchangers, and smart thermal monitoring systems. With these advanced tools, data center teams can improve cooling efficiency, maintain optimal temperatures, reduce energy consumption, and achieve better Power Usage Effectiveness (PUE) outcomes, all while managing the growing demands of power-hungry AI applications.

Profile break-up of primary participants for the report:

By Company Type: Tier 1 – 45%, Tier 2 – 22%, and Tier 3 – 33%

By Designation: C-Level Executives– 50%, Directors– 10%, and Others – 40%

By Region: North America – 17%, Asia Pacific – 17%, Europe – 33%, Middle East & Africa – 25%, and South America – 8%

Leading players operating in the data center air handling units market include STULZ GMBH (Germany), Samsung Electronics (South Korea), Systemair AB (Sweden), Vertiv Group Corp (US), Swegon Group AB, (Sweden), Munters Group AB (Sweden), Johnson Controls (US), Trane (Ireland), Carrier (US), Daikin (Japan), Mitsubishi Electric Corporation (Japan), LG Electronics (South Korea), Trox SE (Germany), Airedale International Air Conditioning Ltd (Modine) (UK), AL-KO THERM GMBH (Germany), AAON (US), Zeco Aircon (India), GD Midea Heating & Ventilating Equipment Co., Ltd. (China), and others. These key players are significant contributors to the data center air handling units market. These players have adopted various strategies, including

agreements, joint ventures, and expansions, to increase their market share and business revenue.

Research Coverage:

The report defines, segments, and projects the size of the data center air handling units market based on data center type, capacity, type, and region. It strategically profiles the key players and comprehensively analyzes their market shares and core competencies. It also tracks and analyzes competitive developments, such as expansions, partnerships, and acquisitions undertaken by them in the market.

Reasons to Buy the Report:

The report is expected to help market leaders/new entrants by providing them with the closest approximations of revenue numbers for the data center air handling units market and its segments. This report is also expected to help stakeholders gain a deeper understanding of the market's competitive landscape, acquire valuable insights to enhance their business positions, and develop effective go-to-market strategies. It also enables stakeholders to understand the market's pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights into the following pointers:

Analysis of drivers (Rapid expansion of data center market, Growing emphasis on energy efficient and sustainable data center cooling, Increasing server rack power density driving demand for advanced airflow management), restraints (Growing adoption of liquid cooling technologies for high density computing, High capital investment and lifecycle costs of advanced AHU systems), opportunities (Increasing adoption of hybrid cooling architectures in AI ready data centers, Growing retrofit and modernization of legacy data center cooling infrastructure), and challenges (Integration challenges in hybrid cooling architectures) influencing the growth of the data center air handling units market

Product Development/Innovation: Detailed insights into upcoming technologies and research & development activities in the data center air handling units market

Market Development: Comprehensive information about lucrative markets – the report analyzes the data center air handling units market across varied regions.

Market Diversification: Exhaustive information about new products, various types, untapped geographies, recent developments, and investments in the data center air handling units market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players such as STULZ GMBH (Germany), Samsung Electronics (South Korea), Systemair AB (Sweden), Vertiv Group Corp (US), Swegon Group AB, (Sweden), Munters Group AB (Sweden), Johnson Controls (US), Trane (Ireland), Carrier (US), Daikin (Japan), Mitsubishi Electric Corporation (Japan), LG Electronics (South Korea), Trox SE (Germany), Airedale International Air Conditioning Ltd (Modine) (UK), AL-KO THERM GMBH (Germany), AAON (US), Zeco Aircon (India), GD Midea Heating & Ventilating Equipment Co., Ltd. (China), and others

Contents

1 INTRODUCTION

- 1.1 STUDY OBJECTIVES
- 1.2 MARKET DEFINITION
- 1.3 STUDY SCOPE
 - 1.3.1 MARKET SEGMENTATION AND REGIONAL SCOPE
 - 1.3.2 INCLUSIONS AND EXCLUSIONS
 - 1.3.3 YEARS CONSIDERED
- 1.4 CURRENCY CONSIDERED
- 1.5 LIMITATIONS
- 1.6 STAKEHOLDERS

2 EXECUTIVE SUMMARY

- 2.1 KEY INSIGHTS AND MARKET HIGHLIGHTS
- 2.2 KEY MARKET PARTICIPANTS: SHARE INSIGHTS AND STRATEGIC DEVELOPMENTS
- 2.3 DISRUPTIVE TRENDS IN DATA CENTER AHU MARKET
- 2.4 HIGH-GROWTH SEGMENTS
- 2.5 REGIONAL SNAPSHOT: MARKET SIZE, GROWTH RATE, AND FORECAST

3 PREMIUM INSIGHTS

- 3.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN DATA CENTER AHU MARKET
- 3.2 DATA CENTER AHU MARKET, BY DATA CENTER TYPE
- 3.3 DATA CENTER AHU MARKET, BY AHU TYPE
- 3.4 DATA CENTER AHU MARKET, BY CAPACITY
- 3.5 DATA CENTER AHU MARKET, BY REGION
- 3.6 DATA CENTER AHU MARKET, BY COUNTRY

4 MARKET OVERVIEW

- 4.1 INTRODUCTION
- 4.2 MARKET DYNAMICS
 - 4.2.1 DRIVERS
 - 4.2.1.1 Rapid expansion of data center market

- 4.2.1.2 Growing emphasis on energy-efficient and sustainable data center cooling
- 4.2.1.3 Increasing server rack power density driving demand for advanced airflow management
- 4.2.2 RESTRAINTS
 - 4.2.2.1 Growing adoption of liquid cooling technologies for high-density computing
 - 4.2.2.2 High capital investment and lifecycle costs of advanced AHU systems
- 4.2.3 OPPORTUNITIES
 - 4.2.3.1 Increasing adoption of hybrid cooling architectures in AI-ready data centers
 - 4.2.3.2 Growing retrofit and modernization of legacy data center cooling infrastructure
- 4.2.4 CHALLENGES
 - 4.2.4.1 Integration challenges in hybrid cooling architectures
- 4.3 UNMET NEEDS AND WHITE SPACES
 - 4.3.1 UNMET NEEDS IN DATA CENTER AHU MARKET
 - 4.3.2 WHITE SPACE OPPORTUNITIES
- 4.4 INTERCONNECTED MARKETS AND CROSS-SECTOR OPPORTUNITIES
 - 4.4.1 INTERCONNECTED MARKETS
 - 4.4.2 CROSS SECTOR OPPORTUNITIES
- 4.5 EMERGING BUSINESS MODELS AND ECOSYSTEM SHIFTS
 - 4.5.1 EMERGING BUSINESS MODELS
 - 4.5.2 ECOSYSTEM SHIFTS
- 4.6 STRATEGIC MOVES BY TIER 1/2/3 PLAYERS
 - 4.6.1 KEY MOVES AND STRATEGIC FOCUS

5 INDUSTRY TRENDS

- 5.1 PORTER'S FIVE FORCES ANALYSIS
 - 5.1.1 BARGAINING POWER OF SUPPLIERS
 - 5.1.2 BARGAINING POWER OF BUYERS
 - 5.1.3 THREAT OF SUBSTITUTES
 - 5.1.4 THREAT OF NEW ENTRANTS
 - 5.1.5 INTENSITY OF COMPETITIVE RIVALRY
- 5.2 MACROECONOMICS INDICATORS
 - 5.2.1 INTRODUCTION
 - 5.2.2 GDP TRENDS AND FORECAST
 - 5.2.3 DATA CENTER INDUSTRY
 - 5.2.4 MANUFACTURING INDUSTRY
 - 5.2.5 TRENDS IN GLOBAL HYPERSCALE AND AI DATA CENTER INDUSTRY
- 5.3 VALUE CHAIN ANALYSIS
 - 5.3.1 PROMINENT COMPANIES

5.4 ECOSYSTEM ANALYSIS

5.5 KEY CONFERENCES & EVENTS IN 2026–2027

5.6 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

5.7 INVESTMENT AND FUNDING SCENARIO

5.8 CASE STUDY ANALYSIS

5.8.1 CASE STUDY 1: JOHNSON CONTROLS (SILENT-AIRE) – MODULAR DATA CENTER AIR HANDLING UNIT SOLUTION

5.8.2 CASE STUDY 2: BESPOKE AIR HANDLING UNIT DEPLOYMENT FOR A HYPERSCALE DATA CENTER IN BELGIUM BY DAIKIN APPLIED UK

6 KEY EMERGING TECHNOLOGIES

6.1 KEY TECHNOLOGIES

6.1.1 INTELLIGENT AHU CONTROL AND MONITORING SYSTEMS

6.1.2 HIGH EFFICIENCY EC FAN AND VARIABLE AIRFLOW TECHNOLOGY

6.2 ADJACENT TECHNOLOGY ANALYSIS

6.2.1 MODULAR AND PREFABRICATED AHU SYSTEMS

6.2.2 WASTE HEAT RECOVERY AND REUSE SYSTEMS

6.3 COMPLEMENTARY TECHNOLOGY ANALYSIS

6.3.1 HYBRID AIR-LIQUID COOLING INTEGRATION SYSTEMS

6.4 TECHNOLOGY/PRODUCT ROADMAP

6.4.1 SHORT TERM (2026 TO 2028) | FOUNDATION & EARLY COMMERCIALIZATION

6.4.2 MID TERM (2028 TO 2032) | EXPANSION & STANDARDIZATION

6.4.3 LONG TERM (2032 TO 2035+) | MASS COMMERCIALIZATION & AUTONOMOUS THERMAL MANAGEMENT

6.5 PATENT ANALYSIS

6.5.1 INTRODUCTION

6.5.2 METHODOLOGY

6.5.3 DOCUMENT TYPE

6.5.4 INSIGHTS

6.5.5 LEGAL STATUS OF PATENTS

6.5.6 JURISDICTION ANALYSIS

6.5.7 TOP APPLICANTS

6.5.7.1 List of major patents

6.6 FUTURE APPLICATIONS

6.6.1 INTELLIGENT AUTONOMOUS AHU CONTROL SYSTEMS: INTELLIGENT AHUS THAT CONTINUOUSLY OPTIMIZE AIRFLOW, TEMPERATURE, HUMIDITY, AND ENERGY CONSUMPTION THROUGH ADAPTIVE CONTROLS AND

PREDICTIVE ANALYTICS

6.6.2 HYBRID COOLING COMPATIBLE AHUS: AHUS DESIGNED FOR SEAMLESS INTEGRATION WITH HYBRID COOLING ARCHITECTURES IN HIGH DENSITY DATA CENTER ENVIRONMENTS

6.6.3 MODULAR AND SCALABLE AHU PLATFORMS: FACTORY-ASSEMBLED MODULAR AHUS THAT ENABLE RAPID DEPLOYMENT, STANDARDIZED EXPANSION, AND SCALABLE COOLING INFRASTRUCTURE FOR HYPERSCALE AND EDGE DATA CENTERS

6.6.4 HEAT RECOVERY COMPATIBLE AHUS: AHUS ENGINEERED FOR COMPATIBILITY WITH FACILITY LEVEL HEAT RECOVERY SYSTEMS TO SUPPORT SUSTAINABLE DATA CENTER COOLING STRATEGIES

6.7 IMPACT OF AI/GEN AI ON DATA CENTER AHU MARKET

6.7.1 INTRODUCTION

6.7.2 TOP USE CASES AND MARKET POTENTIAL

6.7.3 BEST PRACTICES: COMPANIES/ INSTITUTIONS USE CASES

6.7.4 CASE STUDIES OF DATA CENTER AHU MARKET

6.7.5 INTERCONNECTED ADJACENT ECOSYSTEM AND IMPACT ON MARKET PLAYERS

6.7.6 CLIENTS' READINESS TO ADOPT GENERATIVE AI IN DATA CENTER AHU MARKET

6.7.7 JOHNSON CONTROLS (SILENT-AIRE): CUSTOM AIR HANDLING FOR AI READY HYPERSCALE DATA CENTERS

6.7.8 DAIKIN: INTEGRATED AIR HANDLING FOR AI-READY DATA CENTERS

7 SUSTAINABILITY AND REGULATORY LANDSCAPE

7.1 REGIONAL REGULATIONS AND COMPLIANCE

7.1.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

7.1.2 INDUSTRY STANDARDS

7.2 SUSTAINABILITY INITIATIVES

7.2.1 CARBON IMPACT AND ECO APPLICATIONS OF DATA CENTER AHU MARKET

7.3 SUSTAINABILITY IMPACT AND REGULATORY POLICY INITIATIVES

7.4 CERTIFICATIONS, LABELING, AND ECO STANDARDS

8 CUSTOMER LANDSCAPE & BUYER BEHAVIOR

8.1 DECISION MAKING PROCESS

8.2 KEY STAKEHOLDERS IN BUYING PROCESS

8.2.1 KEY STAKEHOLDERS IN BUYING PROCESS

8.2.2 BUYING CRITERIA

8.3 ADOPTION BARRIERS & INTERNAL CHALLENGES

8.4 UNMET NEEDS IN VARIOUS END-USE INDUSTRIES

8.5 MARKET PROFITABILITY

8.5.1 REVENUE POTENTIAL

8.5.2 COST DYNAMICS

8.5.3 MARGIN OPPORTUNITIES IN KEY APPLICATIONS

9 DATA CENTER AHU MARKET, BY TYPE

9.1 INTRODUCTION

9.2 CHILLED WATER (CHW) AHU

9.2.1 EXPANSION OF HYPERSCALE DATA CENTERS AND AI-READY INFRASTRUCTURE DRIVES DEMAND FOR CHILLED WATER AHUS

9.3 DX (DIRECT EXPANSION) AHU

9.3.1 GROWING DEMAND FOR EDGE AND MODULAR DATA CENTERS DRIVES ADOPTION OF DX AHUS

9.4 EVAPORATIVE/ADIABATIC AHU

9.4.1 INCREASING FOCUS ON ENERGY EFFICIENCY AND SUSTAINABILITY DRIVES ADOPTION OF EVAPORATIVE/ADIABATIC AHUS

9.5 OUTSIDE AIR/AIR SIDE ECONOMIZER AHU

9.5.1 INCREASING EMPHASIS ON ENERGY EFFICIENT COOLING DRIVES ADOPTION OF OUTSIDE AIR/AIR SIDE ECONOMIZER AHUS

9.6 HYBRID (DUAL MEDIUM NATIVE) AHU

9.6.1 INCREASING ADOPTION OF FLEXIBLE COOLING ARCHITECTURES DRIVES DEMAND FOR HYBRID AHUS

10 DATA CENTER AHU MARKET, BY CAPACITY

10.1 INTRODUCTION

10.2 ? 5,000 M3/H

10.2.1 GROWING DEPLOYMENT OF EDGE AND MODULAR DATA CENTERS SUPPORTS DEMAND FOR AHUS WITH CAPACITIES UP TO 5,000 M3/H

10.3 5,001–15,000 M3/H

10.3.1 GROWING EXPANSION OF ENTERPRISE AND REGIONAL COLOCATION DATA CENTERS SUPPORTS DEMAND FOR AHUS WITH CAPACITIES OF 5,001–15,000 M3/H

10.4 15,001–30,000 M3/H

10.4.1 INCREASING DEPLOYMENT OF MODULAR HYPERSCALE AND LARGE COLOCATION DATA CENTERS DRIVES DEMAND FOR AHUS WITH CAPACITIES OF 15,001–30,000 M3/H

10.5 30,001–50,000 M3/H

10.5.1 INCREASING RACK POWER DENSITIES DRIVE DEMAND FOR AHUS WITH CAPACITIES OF 30,001–50,000 M3/H

10.6 ? 50,001 M3/H

10.6.1 EXPANSION OF AI MEGA CAMPUSES DRIVES DEMAND FOR AHUS WITH CAPACITIES OF ? 50,001 M3/H

11 DATA CENTER AHU MARKET, BY DATA CENTER TYPE

11.1 INTRODUCTION

11.2 HYPERSCALE

11.2.1 EXPANSION OF AI INFRASTRUCTURE AND HYPERSCALE DATA CENTERS DRIVES DEMAND FOR HIGH-CAPACITY AIR HANDLING UNITS

11.3 COLOCATION PROVIDERS

11.3.1 GROWING DEMAND FOR AI-READY INFRASTRUCTURE DRIVES AHU ADOPTION IN COLOCATION DATA CENTERS

11.4 ENTERPRISES

11.4.1 MODERNIZATION OF LEGACY DATA CENTER INFRASTRUCTURE SUPPORTS AHU ADOPTION IN ENTERPRISE DATA CENTERS

12 DATA CENTER AIR HANDLING UNITS MARKET, BY REGION

12.1 INTRODUCTION

12.2 NORTH AMERICA

12.2.1 US

12.2.1.1 Hyperscale expansion, liquid cooling integration, and AI-driven infrastructure investment to sustain market leadership

12.2.2 CANADA

12.2.2.1 Cold-climate free cooling and renewable power pricing to anchor sustainable AHU demand

12.2.3 MEXICO

12.2.3.1 Nearshoring-led digital investment and hyperscale market entry to drive demand for heat-tolerant AHU systems

12.3 EUROPE

12.3.1 GERMANY

12.3.1.1 EnEfG efficiency mandates and record hyperscale capital deployment to reshape Frankfurt's air handling standards

12.3.2 UK

12.3.2.1 AI growth zones and critical national infrastructure status to unlock a new wave of AHU-equipped capacity

12.3.3 FRANCE

12.3.3.1 Nuclear-backed low-carbon power and sovereign cloud investment to fuel hyperscale AHU demand

12.3.4 ITALY

12.3.4.1 Milan's rise to tier-one status and Mediterranean connectivity to drive new AHU-equipped campus construction

12.3.5 SPAIN

12.3.5.1 Solar-rich power availability and fast-tracked mega-campus to position Spain as a leading growth market

12.3.6 RUSSIA

12.3.6.1 Import substitution and data localization mandates to sustain a domestically oriented AHU market

12.3.7 REST OF EUROPE

12.4 ASIA PACIFIC

12.4.1 CHINA

12.4.1.1 East-west data computing program and sovereign AI buildout to anchor the region's largest AHU market

12.4.2 JAPAN

12.4.2.1 Sovereign AI investment and severe power constraints to elevate demand for high-efficiency, space-optimized AHU systems

12.4.3 INDIA

12.4.3.1 Infrastructure-status incentives and record hyperscaler commitments to drive Asia's fastest-growing AHU demand

12.4.4 SOUTH KOREA

12.4.4.1 18.4 GW national AI data center megaproject to reshape long-term demand for high-density AHU infrastructure

12.4.5 THAILAND

12.4.5.1 BOI incentives and regional diversification beyond Singapore to accelerate new AHU-equipped capacity

12.4.6 TAIWAN

12.4.6.1 Semiconductor leadership and AI chipmaker R&D investment to drive precision, high-density AHU requirements

12.4.7 AUSTRALIA

12.4.7.1 Record capital inflows and OpenAI-NEXTDC partnership to underpin strong

AHU demand through 2030

12.4.8 REST OF ASIA PACIFIC

12.5 MIDDLE EAST & AFRICA

12.5.1 GCC COUNTRIES

12.5.1.1 Saudi Arabia

12.5.1.1.1 HUMAIN's multi-gigawatt sovereign AI buildout to drive the region's most aggressive AHU demand growth

12.5.1.2 UAE

12.5.1.2.1 Stargate UAE and G42's international partnerships to cement the country's position as a regional AI hub

12.5.1.3 Qatar

12.5.1.3.1 Brookfield-QAI partnership and national digital transformation strategy to expand Doha's AHU-equipped capacity

12.5.1.4 Rest of GCC Countries

12.5.2 SOUTH AFRICA

12.5.2.1 Sub-Saharan Africa's leading connectivity hub status to drive steady, grid-resilient AHU investment

12.5.3 TURKEY

12.5.3.1 Istanbul's Europe-Asia connectivity bridge and Google's regional investment to support steady AHU growth

12.5.4 REST OF MIDDLE EAST & AFRICA

12.6 SOUTH AMERICA

12.6.1 BRAZIL

12.6.1.1 ByteDance's record USD 39 billion campus and hyperscale cloud expansion to anchor South America's largest AHU market

12.6.2 ARGENTINA

12.6.2.1 Digital banking growth and government modernization programs to sustain incremental AHU demand despite macro headwinds

12.6.3 REST OF SOUTH AMERICA

13 COMPETITIVE LANDSCAPE

13.1 INTRODUCTION

13.2 KEY PLAYERS' STRATEGIES/RIGHT TO WIN

13.3 REVENUE ANALYSIS, 2025

13.3.1 TOP PLAYERS' REVENUE ANALYSIS

13.4 MARKET SHARE ANALYSIS, 2025

13.4.1 RANKING ANALYSIS OF KEY MARKET PLAYERS

13.4.2 MARKET SHARE ANALYSIS, 2025

- 13.5 BRAND/PRODUCT COMPARISON
- 13.6 COMPANY VALUATION AND FINANCIAL METRICS
- 13.7 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2025
 - 13.7.1 STARS
 - 13.7.2 EMERGING LEADERS
 - 13.7.3 PERVASIVE PLAYERS
 - 13.7.4 PARTICIPANTS
 - 13.7.5 COMPANY FOOTPRINT: KEY PLAYERS, 2025
 - 13.7.5.1 Company footprint
 - 13.7.6 REGION FOOTPRINT
 - 13.7.7 TYPE FOOTPRINT
 - 13.7.8 CAPACITY FOOTPRINT
 - 13.7.9 DATA CENTER TYPE FOOTPRINT
- 13.8 COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2025
 - 13.8.1 PROGRESSIVE COMPANIES
 - 13.8.2 RESPONSIVE COMPANIES
 - 13.8.3 DYNAMIC COMPANIES
 - 13.8.4 STARTING BLOCKS
 - 13.8.5 COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2025
 - 13.8.5.1 Detailed list of key startups/SMEs
 - 13.8.5.2 Competitive benchmarking of key startups/SMEs
- 13.9 COMPETITIVE SCENARIO
 - 13.9.1 PRODUCT LAUNCHES
 - 13.9.2 DEALS

14 COMPANY PROFILES

- 14.1 MAJOR PLAYERS
 - 14.1.1 VERTIV GROUP CORP.
 - 14.1.1.1 Business overview
 - 14.1.1.2 Products/Solutions/Services offered
 - 14.1.1.3 Recent developments
 - 14.1.1.3.1 Product Launches
 - 14.1.1.4 MnM view
 - 14.1.1.4.1 Key strengths
 - 14.1.1.4.2 Strategic choices
 - 14.1.1.4.3 Weaknesses and competitive threats
 - 14.1.2 STULZ GMBH
 - 14.1.2.1 Business overview

- 14.1.2.2 Products/Solutions/Services offered
- 14.1.2.3 MnM view
 - 14.1.2.3.1 Key strengths
 - 14.1.2.3.2 Strategic choices
 - 14.1.2.3.3 Weaknesses and competitive threats
- 14.1.3 SAMSUNG ELECTRONICS CO., LTD. (FL?KTGROUP)
 - 14.1.3.1 Business overview
 - 14.1.3.2 Products/Solutions/Services offered
 - 14.1.3.3 Recent developments
 - 14.1.3.4 MnM view
 - 14.1.3.4.1 Key strengths
 - 14.1.3.4.2 Strategic choices
 - 14.1.3.4.3 Weaknesses and competitive threats
- 14.1.4 SYSTEMAIR AB
 - 14.1.4.1 Business overview
 - 14.1.4.2 Products/Solutions/Services offered
 - 14.1.4.3 Recent developments
 - 14.1.4.3.1 Product Launches
 - 14.1.4.4 MnM view
 - 14.1.4.4.1 Key strengths
 - 14.1.4.4.2 Strategic choices
 - 14.1.4.4.3 Weaknesses and competitive threats
- 14.1.5 SWEGON GROUP AB
 - 14.1.5.1 Business overview
 - 14.1.5.2 Products/Solutions/Services offered
 - 14.1.5.3 Recent developments
 - 14.1.5.4 MnM view
 - 14.1.5.4.1 Key strengths
 - 14.1.5.4.2 Strategic choices
 - 14.1.5.4.3 Weaknesses and competitive threats
- 14.1.6 MUNTERS GROUP AB
 - 14.1.6.1 Business overview
 - 14.1.6.2 Products/Solutions/Services offered
- 14.1.7 JOHNSON CONTROLS
 - 14.1.7.1 Business overview
 - 14.1.7.2 Products/Solutions/Services offered
- 14.1.8 TRANE
 - 14.1.8.1 Business overview
 - 14.1.8.2 Products/Solutions/Services offered

14.1.9 CARRIER

14.1.9.1 Business overview

14.1.9.2 Products/Solutions/Services offered

14.1.10 DAIKIN INDUSTRIES LTD.

14.1.10.1 Business overview

14.1.10.2 Products/Solutions/Services offered

14.1.10.3 Recent developments

14.1.10.3.1 Deals

14.1.11 MITSUBISHI ELECTRIC CORPORATION

14.1.11.1 Business overview

14.1.11.2 Products/Solutions/Services offered

14.1.11.3 Recent developments

14.1.11.3.1 Deals

14.1.11.3.2 Expansions

14.1.12 LG ELECTRONICS

14.1.12.1 Business overview

14.1.12.2 Products/Solutions/Services offered

14.1.13 TROX SE

14.1.13.1 Business overview

14.1.13.2 Products/Solutions/Services offered

14.1.14 AIREDALE INTERNATIONAL AIR CONDITIONING LTD.

14.1.14.1 Business overview

14.1.14.2 Products/Solutions/Services offered

14.1.14.3 Recent developments

14.1.14.3.1 Product Launches

14.1.14.3.2 Deals

14.1.15 AL-KO THERM GMBH

14.1.15.1 Business overview

14.1.15.2 Products/Solutions/Services offered

14.1.16 AAON

14.1.16.1 Business overview

14.1.16.2 Products/Solutions/Services offered

14.1.17 GD MIDEA HEATING & VENTILATING EQUIPMENT CO., LTD.

14.1.17.1 Business overview

14.1.17.2 Products/Solutions/Services offered

14.1.18 ZECO AIRCON

14.1.18.1 Business overview

14.1.18.2 Products/Solutions/Services offered

14.2 OTHER PLAYERS

- 14.2.1 ROSENBERG VENTILATOREN GMBH
- 14.2.2 MENERGA GMBH
- 14.2.3 CHAT UNION CLIMAVENETA
- 14.2.4 NORTEK AIR SOLUTIONS, LLC
- 14.2.5 HAAKON INDUSTRIES
- 14.2.6 MAMMOTH INC.
- 14.2.7 ENTROPIC

15 RESEARCH METHODOLOGY

15.1 RESEARCH DATA

15.1.1 SECONDARY DATA

- 15.1.1.1 List of key secondary sources
- 15.1.1.2 Key data from secondary sources

15.1.2 PRIMARY DATA

- 15.1.2.1 Key data from primary sources
- 15.1.2.2 Key industry insights
- 15.1.2.3 List of primary participants
- 15.1.2.4 Breakdown of primary interviews

15.2 MARKET SIZE ESTIMATION

15.2.1 BOTTOM-UP APPROACH

15.2.2 TOP-DOWN APPROACH

15.3 MARKET FORECAST APPROACH

15.3.1 DEMAND-SIDE ANALYSIS

15.3.2 SUPPLY-SIDE ANALYSIS

15.3.3 CALCULATIONS FOR SUPPLY-SIDE ANALYSIS

15.4 GROWTH FORECAST

15.5 DATA TRIANGULATION

15.6 RESEARCH ASSUMPTIONS

15.7 RESEARCH LIMITATIONS

15.8 RISK ASSESSMENT

15.9 FACTOR ANALYSIS

16 APPENDIX

16.1 DISCUSSION GUIDE

16.2 KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL

16.3 CUSTOMIZATION OPTIONS

16.4 RELATED REPORTS

16.5 AUTHOR DETAILS

List Of Tables

LIST OF TABLES

TABLE 1 DATA CENTER AIR HANDLING UNITS MARKET: INCLUSIONS AND EXCLUSIONS

TABLE 2 DATA CENTER AHU MARKET: PORTER'S FIVE FORCES ANALYSIS

TABLE 3 GDP PERCENTAGE CHANGE, BY KEY COUNTRIES, 2021–2029

TABLE 4 DATA CENTER AHU MARKET: ECOSYSTEM ANALYSIS

TABLE 5 DATA CENTER AHU MARKET: DETAILED LIST OF CONFERENCES & EVENTS

TABLE 6 DATA CENTER AHU MARKET: TOTAL NUMBER OF PATENTS, 2015–2025

TABLE 7 PATENTS RELATED TO DATA CENTER AHUS

TABLE 8 TOP USE CASES AND MARKET POTENTIAL

TABLE 9 BEST PRACTICES: COMPANIES IMPLEMENTING USE CASES

TABLE 10 DATA CENTER AHU MARKET: CASE STUDIES RELATED TO GEN AI IMPLEMENTATION

TABLE 11 INTERCONNECTED ADJACENT ECOSYSTEM AND IMPACT ON MARKET PLAYERS

TABLE 12 NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 13 EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 14 ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 15 ROW: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 16 STANDARDS FOR DATA CENTER AHU

TABLE 17 CERTIFICATIONS, LABELING, AND ECO STANDARDS IN DATA CENTER AHU MARKET

TABLE 18 INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS FOR TOP END-USE INDUSTRIES (%)

TABLE 19 KEY BUYING CRITERIA BY END USER

TABLE 20 DATA CENTER AHU MARKET: UNMET NEEDS IN KEY END-USE INDUSTRIES

TABLE 21 DATA CENTER AHU MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 22 DATA CENTER AHU MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 23 CHILLED WATER (CHW) AHU MARKET, BY REGION, 2022–2025 (USD MILLION)

TABLE 24 CHILLED WATER (CHW) AHU MARKET, BY REGION, 2026–2032 (USD

MILLION)

TABLE 25 DX (DIRECT EXPANSION) AHU MARKET, BY REGION, 2022–2025 (USD MILLION)

TABLE 26 DX (DIRECT EXPANSION) AHU MARKET, BY REGION, 2026–2032 (USD MILLION)

TABLE 27 EVAPORATIVE/ADIABATIC AHU MARKET, BY REGION, 2022–2025 (USD MILLION)

TABLE 28 EVAPORATIVE/ADIABATIC AHU MARKET, BY REGION, 2026–2032 (USD MILLION)

TABLE 29 OUTSIDE AIR/AIR SIDE ECONOMIZER AHU MARKET, BY REGION, 2022–2025 (USD MILLION)

TABLE 30 OUTSIDE AIR/AIR SIDE ECONOMIZER AHU MARKET, BY REGION, 2026–2032 (USD MILLION)

TABLE 31 HYBRID (DUAL MEDIUM NATIVE) AIR HANDLING UNITS, BY REGION, 2022–2025 (USD MILLION)

TABLE 32 HYBRID (DUAL MEDIUM NATIVE) AIR HANDLING UNITS, BY REGION, 2026–2032 (USD MILLION)

TABLE 33 DATA CENTER AHU MARKET, BY CAPACITY, 2022–2025 (USD MILLION)

TABLE 34 DATA CENTER AHU MARKET, BY CAPACITY, 2026–2032 (USD MILLION)

TABLE 35 ? 5,000 M3/H: DATA CENTER AHU MARKET, BY REGION, 2022–2025 (USD MILLION)

TABLE 36 ? 5,000 M3/H: DATA CENTER AHU MARKET, BY REGION, 2026–2032 (USD MILLION)

TABLE 37 5,001–15,000 M3/H: DATA CENTER AHU MARKET, BY REGION, 2022–2025 (USD MILLION)

TABLE 38 5,001–15,000 M3/H: DATA CENTER AHU MARKET, BY REGION, 2026–2032 (USD MILLION)

TABLE 39 15,001–30,000 M3/H: DATA CENTER AHU MARKET, BY REGION, 2022–2025 (USD MILLION)

TABLE 40 15,001–30,000 M3/H: DATA CENTER AHU MARKET, BY REGION, 2026–2032 (USD MILLION)

TABLE 41 30,001–50,000 M3/H: DATA CENTER AHU MARKET, BY REGION, 2022–2025 (USD MILLION)

TABLE 42 30,001–50,000 M3/H: DATA CENTER AHU MARKET, BY REGION, 2026–2032 (USD MILLION)

TABLE 43 ? 50,001 M3/H: DATA CENTER AHU MARKET, BY REGION, 2022–2025 (USD MILLION)

TABLE 44 ? 50,001 M3/H: DATA CENTER AHU MARKET, BY REGION, 2026–2032 (USD MILLION)

TABLE 45 DATA CENTER AHU MARKET, BY DATA CENTER TYPE, 2022–2025
(USD MILLION)

TABLE 46 DATA CENTER AHU MARKET, BY DATA CENTER TYPE, 2026–2032
(USD MILLION)

TABLE 47 HYPERSCALE: DATA CENTER AHU MARKET, BY REGION, 2022–2025
(USD MILLION)

TABLE 48 HYPERSCALE: DATA CENTER AHU MARKET, BY REGION, 2026–2032
(USD MILLION)

TABLE 49 COLOCATION PROVIDERS: DATA CENTER AHU MARKET, BY REGION,
2022–2025 (USD MILLION)

TABLE 50 COLOCATION PROVIDERS: DATA CENTER AHU MARKET, BY REGION,
2026–2032 (USD MILLION)

TABLE 51 ENTERPRISES: DATA CENTER AHU MARKET, BY REGION, 2022–2025
(USD MILLION)

TABLE 52 ENTERPRISES: DATA CENTER AHU MARKET, BY REGION, 2026–2032
(USD MILLION)

TABLE 53 DATA CENTER AIR HANDLING UNITS MARKET, BY REGION, 2022–2025
(USD MILLION)

TABLE 54 DATA CENTER AIR HANDLING UNITS MARKET, BY REGION, 2026–2032
(USD MILLION)

TABLE 55 NORTH AMERICA: DATA CENTER AIR HANDLING UNITS MARKET, BY
COUNTRY, 2022–2025 (USD MILLION)

TABLE 56 NORTH AMERICA: DATA CENTER AIR HANDLING UNITS MARKET, BY
COUNTRY, 2026–2032 (USD MILLION)

TABLE 57 NORTH AMERICA: DATA CENTER AIR HANDLING UNITS MARKET, BY
TYPE, 2022–2025 (USD MILLION)

TABLE 58 NORTH AMERICA: DATA CENTER AIR HANDLING UNITS MARKET, BY
TYPE, 2026–2032 (USD MILLION)

TABLE 59 NORTH AMERICA: DATA CENTER AIR HANDLING UNITS MARKET, BY
DATA CENTER TYPE, 2022–2025 (USD MILLION)

TABLE 60 NORTH AMERICA: DATA CENTER AIR HANDLING UNITS MARKET, BY
DATA CENTER TYPE, 2026–2032 (USD MILLION)

TABLE 61 NORTH AMERICA: DATA CENTER AIR HANDLING UNITS MARKET, BY
CAPACITY, 2022–2025 (USD MILLION)

TABLE 62 NORTH AMERICA: DATA CENTER AIR HANDLING UNITS MARKET, BY
CAPACITY, 2026–2032 (USD MILLION)

TABLE 63 US: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE,
2022–2025 (USD MILLION)

TABLE 64 US: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE,

2026–2032 (USD MILLION)

TABLE 65 CANADA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 66 CANADA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 67 MEXICO: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 68 MEXICO: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 69 EUROPE: DATA CENTER AIR HANDLING UNITS MARKET, BY COUNTRY, 2022–2025 (USD MILLION)

TABLE 70 EUROPE: DATA CENTER AIR HANDLING UNITS MARKET, BY COUNTRY, 2026–2032 (USD MILLION)

TABLE 71 EUROPE: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 72 EUROPE: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 73 EUROPE: DATA CENTER AIR HANDLING UNITS MARKET, BY DATA CENTER TYPE, 2022–2025 (USD MILLION)

TABLE 74 EUROPE: DATA CENTER AIR HANDLING UNITS MARKET, BY DATA CENTER TYPE, 2026–2032 (USD MILLION)

TABLE 75 EUROPE: DATA CENTER AIR HANDLING UNITS MARKET, BY CAPACITY, 2022–2025 (USD MILLION)

TABLE 76 EUROPE: DATA CENTER AIR HANDLING UNITS MARKET, BY CAPACITY, 2026–2032 (USD MILLION)

TABLE 77 GERMANY: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 78 GERMANY: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 79 UK: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 80 UK: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 81 FRANCE: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 82 FRANCE: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 83 ITALY: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 84 ITALY: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 85 SPAIN: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 86 SPAIN: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 87 RUSSIA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 88 RUSSIA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 89 REST OF EUROPE: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 90 REST OF EUROPE: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 91 ASIA PACIFIC: DATA CENTER AIR HANDLING UNITS MARKET, BY COUNTRY, 2022–2025 (USD MILLION)

TABLE 92 ASIA PACIFIC: DATA CENTER AIR HANDLING UNITS MARKET, BY COUNTRY, 2026–2032 (USD MILLION)

TABLE 93 ASIA PACIFIC: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 94 ASIA PACIFIC: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 95 ASIA PACIFIC: DATA CENTER AIR HANDLING UNITS MARKET, BY DATA CENTER TYPE, 2022–2025 (USD MILLION)

TABLE 96 ASIA PACIFIC: DATA CENTER AIR HANDLING UNITS MARKET, BY DATA CENTER TYPE, 2026–2032 (USD MILLION)

TABLE 97 ASIA PACIFIC: DATA CENTER AIR HANDLING UNITS MARKET, BY CAPACITY, 2022–2025 (USD MILLION)

TABLE 98 ASIA PACIFIC: DATA CENTER AIR HANDLING UNITS MARKET, BY CAPACITY, 2026–2032 (USD MILLION)

TABLE 99 CHINA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 100 CHINA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 101 JAPAN: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 102 JAPAN: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 103 INDIA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE,

2022–2025 (USD MILLION)

TABLE 104 INDIA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE,
2026–2032 (USD MILLION)

TABLE 105 SOUTH KOREA: DATA CENTER AIR HANDLING UNITS MARKET, BY
TYPE, 2022–2025 (USD MILLION)

TABLE 106 SOUTH KOREA: DATA CENTER AIR HANDLING UNITS MARKET, BY
TYPE, 2026–2032 (USD MILLION)

TABLE 107 THAILAND: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE,
2022–2025 (USD MILLION)

TABLE 108 THAILAND: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE,
2026–2032 (USD MILLION)

TABLE 109 TAIWAN: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE,
2022–2025 (USD MILLION)

TABLE 110 TAIWAN: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE,
2026–2032 (USD MILLION)

TABLE 111 AUSTRALIA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE,
2022–2025 (USD MILLION)

TABLE 112 AUSTRALIA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE,
2026–2032 (USD MILLION)

TABLE 113 REST OF ASIA PACIFIC: DATA CENTER AIR HANDLING UNITS
MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 114 REST OF ASIA PACIFIC: DATA CENTER AIR HANDLING UNITS
MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 115 MIDDLE EAST & AFRICA: DATA CENTER AIR HANDLING UNITS
MARKET, BY COUNTRY, 2022–2025 (USD MILLION)

TABLE 116 MIDDLE EAST & AFRICA: DATA CENTER AIR HANDLING UNITS
MARKET, BY COUNTRY, 2026–2032 (USD MILLION)

TABLE 117 MIDDLE EAST & AFRICA: DATA CENTER AIR HANDLING UNITS
MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 118 MIDDLE EAST & AFRICA: DATA CENTER AIR HANDLING UNITS
MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 119 MIDDLE EAST & AFRICA: DATA CENTER AIR HANDLING UNITS
MARKET, BY DATA CENTER TYPE, 2022–2025 (USD MILLION)

TABLE 120 MIDDLE EAST & AFRICA: DATA CENTER AIR HANDLING UNITS
MARKET, BY DATA CENTER TYPE, 2026–2032 (USD MILLION)

TABLE 121 MIDDLE EAST & AFRICA: DATA CENTER AIR HANDLING UNITS
MARKET, BY CAPACITY, 2022–2025 (USD MILLION)

TABLE 122 MIDDLE EAST & AFRICA: DATA CENTER AIR HANDLING UNITS
MARKET, BY CAPACITY, 2026–2032 (USD MILLION)

TABLE 123 SAUDI ARABIA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 124 SAUDI ARABIA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 125 UAE: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 126 UAE: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 127 QATAR: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 128 QATAR: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 129 REST OF GCC COUNTRIES: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 130 REST OF GCC COUNTRIES: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 131 SOUTH AFRICA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 132 SOUTH AFRICA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 133 TURKEY: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 134 TURKEY: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 135 REST OF MIDDLE EAST & AFRICA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 136 REST OF MIDDLE EAST & AFRICA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 137 SOUTH AMERICA: DATA CENTER AIR HANDLING UNITS MARKET, BY COUNTRY, 2022–2025 (USD MILLION)

TABLE 138 SOUTH AMERICA: DATA CENTER AIR HANDLING UNITS MARKET, BY COUNTRY, 2026–2032 (USD MILLION)

TABLE 139 SOUTH AMERICA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 140 SOUTH AMERICA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 141 SOUTH AMERICA: DATA CENTER AIR HANDLING UNITS MARKET, BY DATA CENTER TYPE, 2022–2025 (USD MILLION)

TABLE 142 SOUTH AMERICA: DATA CENTER AIR HANDLING UNITS MARKET, BY

DATA CENTER TYPE, 2026–2032 (USD MILLION)

TABLE 143 SOUTH AMERICA: DATA CENTER AIR HANDLING UNITS MARKET, BY CAPACITY, 2022–2025 (USD MILLION)

TABLE 144 SOUTH AMERICA: DATA CENTER AIR HANDLING UNITS MARKET, BY CAPACITY, 2026–2032 (USD MILLION)

TABLE 145 BRAZIL: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 146 BRAZIL: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 147 ARGENTINA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 148 ARGENTINA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 149 REST OF SOUTH AMERICA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2022–2025 (USD MILLION)

TABLE 150 REST OF SOUTH AMERICA: DATA CENTER AIR HANDLING UNITS MARKET, BY TYPE, 2026–2032 (USD MILLION)

TABLE 151 DATA CENTER AIR HANDLING UNITS MARKET: OVERVIEW OF STRATEGIES ADOPTED BY KEY PLAYERS, 2021–2026

TABLE 152 DATA CENTER AIR HANDLING UNITS MARKET: DEGREE OF COMPETITION, 2025

TABLE 153 DATA CENTER AIR HANDLING UNITS MARKET: REGION FOOTPRINT

TABLE 154 DATA CENTER AIR HANDLING UNITS MARKET: TYPE FOOTPRINT

TABLE 155 DATA CENTER AIR HANDLING UNITS MARKET: CAPACITY FOOTPRINT

TABLE 156 DATA CENTER AIR HANDLING UNITS MARKET: DATA CENTER TYPE FOOTPRINT

TABLE 157 DATA CENTER AIR HANDLING UNITS MARKET: DETAILED LIST OF KEY STARTUPS/SMES

TABLE 158 DATA CENTER AIR HANDLING UNITS MARKET: COMPETITIVE BENCHMARKING OF KEY STARTUPS/SMES (1/2)

TABLE 159 DATA CENTER AIR HANDLING UNITS MARKET: COMPETITIVE BENCHMARKING OF KEY STARTUPS/SMES (2/2)

TABLE 160 DATA CENTER AIR HANDLING UNITS MARKET: PRODUCT LAUNCHES, JANUARY 2021–JULY 2026

TABLE 161 DATA CENTER AIR HANDLING UNITS MARKET: DEALS, JANUARY 2021–JULY 2026

TABLE 162 VERTIV GROUP CORP.: COMPANY OVERVIEW

TABLE 163 VERTIV GROUP CORP.: PRODUCTS/SOLUTIONS/SERVICES

OFFERED

TABLE 164 VERTIV GROUP CORP.: PRODUCT LAUNCHES

TABLE 165 STULZ GMBH: COMPANY OVERVIEW

TABLE 166 STULZ GMBH: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 167 SAMSUNG ELECTRONICS CO., LTD. (FL?KTGROUP): COMPANY
OVERVIEWTABLE 168 SAMSUNG ELECTRONICS CO., LTD. (FL?KTGROUP):
PRODUCTS/SOLUTIONS/ SERVICES OFFERED

TABLE 169 SAMSUNG ELECTRONICS CO., LTD. (FL?KTGROUP): DEALS

TABLE 170 SYSTEMAIR AB: COMPANY OVERVIEW

TABLE 171 SYSTEMAIR AB: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 172 SYSTEMAIR AB: PRODUCT LAUNCHES

TABLE 173 SWEGON GROUP AB: COMPANY OVERVIEW

TABLE 174 SWEGON GROUP AB: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 175 SWEGON GROUP AB: DEALS

TABLE 176 MUNTERS GROUP AB: COMPANY OVERVIEW

TABLE 177 MUNTERS GROUP AB: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 178 JOHNSON CONTROLS: COMPANY OVERVIEW

TABLE 179 JOHNSON CONTROLS: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 180 TRANE: COMPANY OVERVIEW

TABLE 181 TRANE: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 182 CARRIER: COMPANY OVERVIEW

TABLE 183 CARRIER: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 184 DAIKIN INDUSTRIES LTD.: COMPANY OVERVIEW

TABLE 185 DAIKIN INDUSTRIES LTD.: PRODUCTS/SOLUTIONS/SERVICES
OFFERED

TABLE 186 DAIKIN INDUSTRIES LTD.: DEALS

TABLE 187 MITSUBISHI ELECTRIC CORPORATION: COMPANY OVERVIEW

TABLE 188 MITSUBISHI ELECTRIC CORPORATION:
PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 189 MITSUBISHI ELECTRIC CORPORATION: DEALS

TABLE 190 MITSUBISHI ELECTRIC CORPORATION: EXPANSIONS

TABLE 191 LG ELECTRONICS: COMPANY OVERVIEW

TABLE 192 LG ELECTRONICS: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 193 TROX SE: COMPANY OVERVIEW

TABLE 194 TROX SE: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 195 AIREDALE INTERNATIONAL AIR CONDITIONING LTD.: COMPANY
OVERVIEW

TABLE 196 AIREDALE INTERNATIONAL AIR CONDITIONING LTD.:

PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 197 AIREDALE INTERNATIONAL AIR CONDITIONING LTD.: PRODUCT LAUNCHES

TABLE 198 AIREDALE INTERNATIONAL AIR CONDITIONING LTD.: DEALS

TABLE 199 AL-KO THERM GMBH: COMPANY OVERVIEW

TABLE 200 AL-KO THERM GMBH: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 201 AAON: COMPANY OVERVIEW

TABLE 202 AAON: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 203 GD MIDEA HEATING & VENTILATING EQUIPMENT CO., LTD.: COMPANY OVERVIEW

TABLE 204 GD MIDEA HEATING & VENTILATING EQUIPMENT CO., LTD.: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 205 ZECO AIRCON: COMPANY OVERVIEW

TABLE 206 ZECO AIRCON: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 207 ROSENBERG VENTILATOREN GMBH: COMPANY OVERVIEW

TABLE 208 MENERGA GMBH: COMPANY OVERVIEW

TABLE 209 CHAT UNION CLIMAVENETA: COMPANY OVERVIEW

TABLE 210 NORTEK AIR SOLUTIONS, LLC: COMPANY OVERVIEW

TABLE 211 HAAKON INDUSTRIES: COMPANY OVERVIEW

TABLE 212 MAMMOTH INC.: COMPANY OVERVIEW

TABLE 213 ENTROPIC: COMPANY OVERVIEW

List Of Figures

LIST OF FIGURES

FIGURE 1 DATA CENTER AIR HANDLING UNITS MARKET SEGMENTATION AND REGIONAL SCOPE

FIGURE 2 KEY INSIGHTS AND MARKET HIGHLIGHTS

FIGURE 3 GLOBAL DATA CENTER AHU MARKET, 2026–2032

FIGURE 4 MAJOR STRATEGIES ADOPTED BY KEY PLAYERS IN DATA CENTER AHU MARKET (2020–2025)

FIGURE 5 DISRUPTIVE TRENDS IMPACTING GROWTH OF DATA CENTER AHU MARKET

FIGURE 6 HIGH-GROWTH SEGMENTS IN DATA CENTER AHU MARKET

FIGURE 7 NORTH AMERICA TO EXHIBIT FASTEST GROWTH DURING FORECAST PERIOD

FIGURE 8 EXPANSION OF AI-READY DATA CENTERS AND HIGH-DENSITY COMPUTING TO CREATE LUCRATIVE OPPORTUNITIES FOR AHU MANUFACTURERS

FIGURE 9 HYPERSCALE DATA CENTERS TO BE LARGEST SEGMENT DURING FORECAST PERIOD

FIGURE 10 CHILLED WATER (CHW) AHU TO SECURE LEADING POSITION DURING FORECAST PERIOD

FIGURE 11 30,001–50,000 M³/H TO BE LARGEST MARKET BY CAPACITY DURING FORECAST PERIOD

FIGURE 12 NORTH AMERICA TO DOMINATE GLOBAL DATA CENTER AHU MARKET

FIGURE 13 US TO BE FASTEST-GROWING MARKET DURING FORECAST PERIOD

FIGURE 14 DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN DATA CENTER AHU MARKET

FIGURE 15 NUMBER OF DATA CENTERS WORLDWIDE FOR TOP 10 COUNTRIES, 2026

FIGURE 16 GLOBAL DATA CENTER POWER USAGE EFFECTIVENESS (PUE)

FIGURE 17 PORTER'S FIVE FORCES ANALYSIS: DATA CENTER AHU MARKET

FIGURE 18 GROWTH IN AI MARKET 2023 VS. 2033 (USD BILLION)

FIGURE 19 VALUE CHAIN ANALYSIS: DATA CENTER AHU MARKET

FIGURE 20 DATA CENTER AHU MARKET: ECOSYSTEM ANALYSIS

FIGURE 21 DATA CENTER AHU MARKET: ECOSYSTEM ANALYSIS

FIGURE 22 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

FIGURE 23 DATA CENTER AHU MARKET: INVESTMENT AND FUNDING SCENARIO, 2026 (USD MILLION)

FIGURE 24 PATENT ANALYSIS, BY DOCUMENT TYPE, 2015 – 2025

FIGURE 25 PATENT PUBLICATION TRENDS, 2015 – 2025

FIGURE 26 LEGAL STATUS OF PATENTS, JANUARY 2015 – DECEMBER 2025

FIGURE 27 JURISDICTION OF US REGISTERED HIGHEST SHARE OF PATENTS, 2015–2025

FIGURE 28 TOP PATENT APPLICANTS, 2015–2025

FIGURE 29 FUTURE APPLICATIONS OF DATA CENTER AHU MARKET

FIGURE 30 SUCCESS STORIES AND REAL WORLD APPLICATIONS

FIGURE 31 DATA CENTER AHU MARKET: DECISION MAKING FACTORS

FIGURE 32 INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS, BY END USER

FIGURE 33 KEY BUYING CRITERIA FOR TOP THREE END-USE INDUSTRIES

FIGURE 34 ADOPTION BARRIERS AND INTERNAL CHALLENGES

FIGURE 35 CHILLED WATER (CHW) AHU TO ACCOUNT FOR LARGER SHARE DURING FORECAST PERIOD

FIGURE 36 30,001–50,000 M3/H TO BE LARGEST CAPACITY TYPE FOR DATA CENTER AHU MARKET DURING FORECAST PERIOD

FIGURE 37 HYPERSCALE DATA CENTERS TO BE LARGEST AND FASTEST-GROWING DATA CENTER TYPE DURING FORECAST PERIOD

FIGURE 38 NORTH AMERICA TO ACCOUNT FOR THE LARGEST MARKET SHARE IN 2032

FIGURE 39 NORTH AMERICA: DATA CENTER AIR HANDLING UNITS MARKET SNAPSHOT

FIGURE 40 EUROPE: DATA CENTER AIR HANDLING UNITS MARKET SNAPSHOT

FIGURE 41 ASIA PACIFIC: DATA CENTER AIR HANDLING UNITS MARKET SNAPSHOT

FIGURE 42 DATA CENTER AIR HANDLING UNITS MARKET: REVENUE ANALYSIS OF KEY COMPANIES, 2021–2025

FIGURE 43 DATA CENTER AIR HANDLING UNITS MARKET: RANKING OF TOP FIVE PLAYERS, 2025

FIGURE 44 DATA CENTER AIR HANDLING UNITS MARKET SHARE ANALYSIS, 2025

FIGURE 45 DATA CENTER AIR HANDLING UNITS MARKET: BRAND/PRODUCT COMPARISON

FIGURE 46 DATA CENTER AIR HANDLING UNITS MARKET: EV/EBITDA

FIGURE 47 DATA CENTER AIR HANDLING UNITS MARKET: EV/REVENUE

FIGURE 48 DATA CENTER AIR HANDLING UNITS MARKET: YEAR-TO-DATE (YTD) PRICE TOTAL RETURN AND FIVE-YEAR STOCK BETA OF KEY MANUFACTURERS

FIGURE 49 DATA CENTER AIR HANDLING UNITS MARKET: COMPANY

EVALUATION MATRIX (KEY PLAYERS), 2025

FIGURE 50 DATA CENTER AIR HANDLING UNITS MARKET: COMPANY FOOTPRINT

FIGURE 51 DATA CENTER AIR HANDLING UNITS MARKET: COMPANY EVALUATION MATRIX (STARTUPS/SMES), 2025

FIGURE 52 VERTIV GROUP CORP.: COMPANY SNAPSHOT

FIGURE 53 SAMSUNG ELECTRONICS CO., LTD. (FL?KTGROUP): COMPANY SNAPSHOT

FIGURE 54 SYSTEMAIR AB: COMPANY SNAPSHOT

FIGURE 55 MUNTERS GROUP AB: COMPANY SNAPSHOT

FIGURE 56 JOHNSON CONTROLS: COMPANY SNAPSHOT

FIGURE 57 TRANE: COMPANY SNAPSHOT

FIGURE 58 CARRIER: COMPANY SNAPSHOT

FIGURE 59 DAIKIN INDUSTRIES LTD.: COMPANY SNAPSHOT

FIGURE 60 MITSUBISHI ELECTRIC CORPORATION: COMPANY SNAPSHOT

FIGURE 61 LG ELECTRONICS: COMPANY SNAPSHOT

FIGURE 62 AAON: COMPANY SNAPSHOT

FIGURE 63 GD MIDEA HEATING & VENTILATING EQUIPMENT CO., LTD.: COMPANY SNAPSHOT

FIGURE 64 DATA CENTER AIR HANDLING UNITS MARKET: RESEARCH DESIGN

FIGURE 65 MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH

FIGURE 66 MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH

FIGURE 67 MAIN MATRIX CONSIDERED TO ASSESS DEMAND FOR DATA CENTER AIR HANDLING UNITS

FIGURE 68 STEPS CONSIDERED TO ANALYZE SUPPLY OF DATA CENTER AIR HANDLING UNITS

FIGURE 69 DATA CENTER AIR HANDLING UNITS MARKET: DATA TRIANGULATION

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