

Data Center Chillers Market by Product (Air-Cooled Chillers, Water-Cooled Chillers, and Liquid Coolant Chillers), Technology (Scroll Chillers, Screw Chillers, and Centrifugal Chillers), and Region - Global Forecast to 2032

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Abstracts

The global data center chillers market is projected to grow from USD 1.67 billion in 2026 to USD 2.81 billion in 2032, at a CAGR of 9.0% during the forecast period.

Data center chillers are essential infrastructure systems that enable data centers to maintain controlled operating environments by efficiently removing excess heat produced during continuous computing operations. As data centers handle increasing volumes of digital traffic and process more complex workloads, effective cooling has become a critical requirement for ensuring equipment longevity, system stability, and uninterrupted service availability. Chiller systems help balance thermal loads while supporting optimal energy management across facilities of varying sizes. The growth of the data center chillers market is being fueled by the rising adoption of cloud-based applications, digital storage services, enterprise data processing, and connected technologies that require robust computing infrastructure. Additionally, increasing investments in hyperscale facilities, the expansion of edge computing networks, and the growing need for energy-efficient data center operations are driving demand for advanced cooling solutions. As organizations continue to prioritize performance, scalability, and sustainability in their digital infrastructure strategies, the adoption of data center chillers is expected to increase steadily across the industry.

“By product, the air-cooled chillers segment is expected to account for the second-largest share during the forecast period.”

The air-cooled chillers segment is expected to hold the second-largest share of the data center chillers market due to its relatively simple installation requirements, lower upfront infrastructure costs, and suitability for a wide range of data center applications. Unlike water-cooled systems, air-cooled chillers do not require cooling towers or extensive water management infrastructure, making them particularly attractive for facilities seeking faster deployment and reduced operational complexity. Their ability to provide reliable cooling performance while minimizing water consumption has become increasingly important as data center operators focus on sustainability and resource efficiency. Additionally, the growing expansion of edge data centers, modular data centers, and small- to medium-sized facilities is supporting the adoption of air-cooled chillers, as these installations often prioritize flexibility, ease of maintenance, and lower installation footprints. Continuous advancements in energy-efficient designs and control technologies are further enhancing their performance and operational effectiveness. As data center investments continue to expand globally, the widespread applicability and cost-effective cooling capabilities of air-cooled chillers are expected to sustain their strong market presence and contribute significantly to the growth of the data center chillers market.

“By technology, the centrifugal chillers segment is expected to account for the second-largest market share during the forecast period.”

The centrifugal chillers segment is expected to hold the second-largest share of the data center chillers market owing to its widespread use in large-scale and hyperscale data center facilities that require substantial cooling capacities and high operational efficiency. These chillers are particularly well-suited for managing the significant heat loads generated by dense server environments, making them a preferred choice for large data centers handling cloud computing, artificial intelligence, and high-performance computing workloads. Their ability to deliver efficient cooling at scale while maintaining lower energy consumption per unit of cooling capacity supports efforts to improve overall facility efficiency and reduce operating costs. In addition, the ongoing expansion of hyperscale data centers and the increasing focus on optimizing power usage effectiveness (PUE) are driving investments in centrifugal chiller systems. Continuous technological advancements, including improved compressor designs, variable-speed drives, and smart monitoring capabilities, are further enhancing their performance and reliability. As demand for large-capacity cooling infrastructure continues to grow, centrifugal chillers are expected to maintain a significant market position and contribute substantially to the expansion of the data center chillers market.

“Europe to account for second-largest market share during forecast period”

Europe is expected to hold the second-largest share of the data center chillers market due to its well-established digital infrastructure, strong presence of colocation and hyperscale data centers, and continuous investments in cloud computing and enterprise data management. The region is witnessing increasing demand for data processing and storage services driven by digital transformation initiatives across industries such as finance, healthcare, manufacturing, telecommunications, and government services. Additionally, stringent energy efficiency regulations and sustainability objectives are encouraging data center operators to adopt advanced cooling technologies that reduce energy consumption while maintaining reliable performance. The growing deployment of artificial intelligence applications, edge computing facilities, and high-performance computing infrastructure is further increasing the need for efficient thermal management solutions across the region. Furthermore, modernization of existing data centers and the construction of new facilities to support rising digital workloads are contributing to sustained demand for chiller systems. As operators continue to focus on operational efficiency, environmental compliance, and infrastructure resilience, Europe is expected to maintain a significant share of the data center chillers market.

Profile break-up of primary participants for the report:

By Company Type: Tier 1 – 65%, Tier 2 – 20%, and Tier 3 – 15%

By Designation: Directors – 25%, Managers – 30%, and Others – 45%

By Region: North America – 30%, Asia Pacific – 40%, Europe – 20%, Middle East & Africa – 7%, and South America – 3%

Johnson Controls (Ireland), Trane Technologies (Ireland), Carrier (US), Daikin (Japan), and Vertiv Group Corp. (US) are some of the major players operating in the data center chillers market.

Research Coverage:

The report segments the data center chillers market based on product, technology, cooling capacity, and region. It provides detailed information regarding the major factors influencing the market's growth, such as drivers, restraints, opportunities, and challenges. It strategically profiles data center chillers manufacturers, comprehensively analyzing their market shares and core competencies.

Reasons to Buy the Report:

The report is expected to help the market leaders/new entrants by providing them with the closest approximations of revenue numbers of the data center chillers market and its segments. This report is also expected to help stakeholders obtain an improved understanding of the market's competitive landscape, gain insights to improve the position of their businesses, and make suitable 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 critical DROCs: Drivers (Rising demand for energy-efficient centralized cooling driven by stringent PUE targets and AI-era power densities; Rapid expansion of hyperscale and cloud data centers driving high-capacity chiller deployments; Surging heat loads from AI, GPU clusters, and high-performance computing demanding high-capacity thermal management; and Tightening energy efficiency regulations and sustainability mandates pushing adoption of advanced chiller systems with low-GWP refrigerants), restraints (High upfront capital expenditure for advanced chiller systems; and complexity and cost of retrofitting legacy data centers with modern chiller infrastructure, including cooling towers, condenser water loops, and piping systems), opportunities (Growing adoption of liquid coolant and direct-to-chip cooling creating demand for specialized liquid coolant chiller systems integrated with data center infrastructure; Growing demand for modular and prefabricated chiller plants enabling faster deployment and scalable capacity expansion for edge and hyperscale data centers; and Advancement of AI-driven and IoT-enabled chiller management systems improving predictive maintenance, load optimization, and energy efficiency), and challenges (Ensuring chiller system redundancy and resilience to meet Tier III/IV uptime requirements and avoid single points of failure in mission-critical environments; Pressure to transition to low-GWP and natural refrigerants while managing phase-out of legacy HFC-based chiller fleets without disrupting operations; and Managing rising water scarcity concerns for water-cooled chiller deployments, driving operational and regulatory risk especially in water-stressed geographies)

Product Development/Innovation: Detailed insights on upcoming technologies and research & development activities in the data center chillers market

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

Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players such as Johnson Controls (Ireland), Trane Technologies (Ireland), Carrier (US), Daikin (Japan), and Vertiv Group Corp. (US) in the data center chillers market.

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