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Israel Data Center Cooling - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2030)

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Abstracts

The Israel Data Center Cooling Market size is estimated at USD 15.80 million in 2024, and is expected to reach USD 37.10 million by 2030, growing at a CAGR of 15.40% during the forecast period (2024-2030).

Key Highlights

The increasing demand for cloud computing among SMEs, government regulations for local data security, and growing investment by domestic players are some major factors driving the demand for data centers.

Under Construction IT Load Capacity: The upcoming IT load capacity of the Israeli data center market is expected to reach more than 277.2 MW by 2029.

Under Construction Raised Floor Space: The country's construction of raised floor areas is expected to increase by above 0.9 million sq. ft by 2029.

Planned Racks: The country's total number of racks to be installed is expected to reach 49,737 units by 2029. Tel Aviv is expected to house the maximum number of racks by 2029.

Planned Submarine Cables: There are several under construction. One such cable, Blue, is estimated to start service in 2024. It stretches over 4,696 kilometers and has landing points from Tel Aviv.

New data centers across the country are focusing on implementing state-of-the-art

monitoring systems to mitigate the risks associated with extreme weather events. Many would use the latest, more energy-efficient cooling technologies, such as redundant cooling systems, smart monitoring technologies, and backup power generators, to ensure consistency of temperature in the event of power interruptions. Another example is direct liquid cooling, which uses a higher thermal transfer of water to a more efficient cooling device.

The average winter temperature is between 5 °C (40 °F) and 15 °C (60 °F), and the average summer temperature is between 27 °C (80 °F) and over 32 °C (90 °F). Winters can vary widely across the country, with frequent cold, fog, and snow periods in the north and more pleasant weather in the south. Depending upon climatic conditions, DC cooling is done in the DC facilities.

Israel Data Center Cooling Market Trends

IT and Telecom to Have Significant Market Share

The manufacturing industry accounted for an IT load capacity of 40.3 MW in 2022, constituting a significant share of the total IT load utilization. This is due to the fact that different manufacturing sectors are choosing digitalization, including aerospace and defense, telecommunications equipment, aviation communications, chemical products, and computer hardware and software.

By the end of March 2022, Israel was among the eight countries in the Middle East and North Africa to launch commercial 5G. The industry-grade demand for a minimal latency rate would drive the growth of the telecom industry in the country. Similarly, as 5G gains traction for the general public, it will generate more demand for the data centers to provide the platform, facilitating the system requirements for the same.

Furthermore, Google Cloud facilitates cloud services for the Israeli government, justifying the 28.82 MW of IT load capacity accounted for by the government.

Liquid Cooling to Record Significant Share

Liquid cooling offers many benefits in data centers, making it an attractive option for cooling computing environments with high performance. It has also been shown to be more energy-efficient than conventional air conditioning. It reduces the need for

overcooling and improves the energy efficiency of data centers by providing precise temperature control.

Technological advances have helped to reduce data centers' water consumption by more than 15% in tropical climates and 80% in green areas, making liquid cooling easier to maintain, scale up, or affordable. Energy used for liquid cooling can be recycled to heat buildings and drinking water, while advanced artificial refrigerants can significantly reduce the carbon footprint of air conditioners.

Liquid cooling takes advantage of space constraints and superior heat transfer properties of water or other liquids to provide efficient and cost-effective cooling of high-density racks up to 3000 times more efficiently than air. Long proven in mainframe and gaming applications, liquid cooling is increasingly being used to protect rack servers in regional data centers. Recently, Vertiv Introduced a water-efficient liquid cooling solution for high-density data centers, the Liebert XDU, a new generation of thermal management systems that supports liquid-cooled servers and enables the control of liquid quality, flow, and pressure.

Tel Aviv is the country's major hotspot, accounting for 38.80 MW of the IT load capacity, which is expected to show stagnant growth during the forecast period.

The region is a major technological hub, with its proximity to crucial government facilities, power resources, and technological advancements required for empowering and operating data centers. This also includes several client companies in and around Tel Aviv, leveraging faster internet connectivity through the facilities.

Petah Tikva benefits from the proximity of energy resources and business parks to Tel Aviv, including several data centers. Also, both locations leverage efficient disaster management services, which are essential for the uninterrupted functionality of data center facilities.

Israel Data Center Cooling Industry Overview

The Israeli data center cooling market is fragmented as the benefits offered by the technology and support from the government by imposing efficiency regulations on data centers are expected to help the growth of the data center cooling market directly. Market penetration is growing with a strong presence of major players such as

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Schneider Electric SE, Rittal GMBH & Co.KG, Mitsubishi Electric Hydronics & IT Cooling Systems SpA, Johnson Controls International PLC, and Asetek A/S.

In April 2024, Carrier Global Corporation partnered with Strategic Thermal Labs to develop direct-to-chip cooling technology. Under this partnership, Carrier will leverage the advancement in this technology and incorporate it into its data center cooling solutions.

In December 2023, Vertiv completed the acquisition of Cooltera Ltd, a manufacturer of coolant distribution units (CDU) and secondary fluid networks (SFN). This acquisition is expected to improve the existing DC cooling solutions offered by the company.

Additional Benefits:

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