

Asia Pacific Data Center Cooling Fans Market Forecast to 2031 - Regional Analysis by Type (Axial Fans, Centrifugal Fans, Mixed Flow Fans, and Others) and Data Center Type (Hyperscale Data Center, Colocation Data Center, Wholesale Data Center, Enterprise Data Center, and Edge Data Center)

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Abstracts

The Asia Pacific data center cooling fans market was valued at US\$ 71.44 million in 2023 and is expected to reach US\$ 120.70 million by 2031; it is projected to register a CAGR of 6.8% from 2023 to 2031.

Rising Adoption of Electronically Commutated (EC) Fans Boosts Asia Pacific Data Center Cooling Fans Market

Electronically commutated (EC) fans are direct drive fans integrated into the cooling unit to manage temperature by removing excess heat in the data center. These fans are naturally more efficient than ordinary fans due to their unique design, which incorporates a brushless EC motor and a rearward curved motorized impeller. The benefits provided by EC fans to data centers are - EC fans are easy to install on existing cooling units or specified servers. They offer a low maintenance advantage to data centers. These fans also reduce additional maintenance costs, as they have no fan belts that can wear out, and their integrated motors virtually eliminate fan dust. EC fans are integrated with modern motor control algorithms that allow them to run at a peak by achieving exact speed control. EC fans' high-efficiency motor design and precision airflow control provide the data center with continuous and reliable airflow. This ensures that vital IT equipment in data centers and server rooms receive the necessary cooling. EC fans are integrated with a brushless motor that reduces the need for maintenance-

intensive brushes, resulting in longer fan lifespans and less downtime. EC fans create low noise, which is especially important in data centers and server rooms, where noise may be a major distraction for operators and lead to compliance difficulties. Significant benefits provided by EC fans are creating opportunities for market growth. Moreover, the demand for high-performing EC motors for data center cooling fans encourages manufacturers to develop next-generation EC motors that enhance the performance of cooling fans. For instance, in April 2024, Blauberg Ventilatoren GmbH introduced the latest line of centrifugal fans powered by the EC102 500 W motor. These centrifugal fans are energy efficient, with the added convenience of the Modbus RS-485 data protocol. The EC fans are highly energy-efficient cooling solutions that reduce energy consumption by more than 10-15%, allowing data center designers to save money on upstream electrical infrastructure such as wiring, circuit breakers, and transformers. Hence, the demand for energy-efficient, eco-friendly, and cost-efficient cooling fans for airflow management in data centers and server rooms is expected to create opportunities in the market.

Asia Pacific Data Center Cooling Fans Market Overview

The Asia Pacific data center cooling fans market is further segmented into China, India, Japan, Australia, South Korea, and the Rest of Asia Pacific. The market growth in this region is driven by the progress in the data center industry, digitalization, 5G network infrastructure, and cloud computing the Internet of Things capabilities. It is also ascribed to regulations that closely monitor the demand and supply of local data storage facilities, which result in an upsurge in the number of data centers in Asia Pacific. In recent years, the region's data center infrastructure has grown significantly. The emergence of AI and ML has also increased demand for data centers with significant IT capacities.

As per Savills PLC, data center investments in Asia Pacific totaled US\$ 1.7 billion during Q1 2024, recording an 81% surge quarter-on-quarter (QoQ) and a 325% increase year-on-year (YoY). This represents 80% of the overall investment volume for 2023. With the rise in data center capacity, the need for fans and other cooling systems is expected to increase in Asia Pacific. Institutional investors such as Hillhouse, Rava Partners, Boyu, Princeville Capital, and Tekne Capital, in an alliance, purchased a 43.9% stake in GDS's worldwide data center business through a Series A convertible preferred share subscription (worth US\$ 587 million). The portfolio includes data centers of a total capacity of 330 MW, which are under construction outside of Mainland China, for future expansion in critical areas such as Hong Kong, Singapore, Malaysia (Johor), and Indonesia (Batam). With such investment, the demand for data center cooling fans is expected to continue to grow in China in the coming years.

Asia Pacific Data Center Cooling Fans Market Revenue and Forecast to 2031 (US\$ Million)

Asia Pacific Data Center Cooling Fans Market Segmentation

The Asia Pacific data center cooling fans market is categorized into type, data center type, and country.

Based on type, the Asia Pacific data center cooling fans market is segmented into axial fans, centrifugal fans, mixed flow fans, and others. The axial fans segment held the largest market share in 2023.

By data center type, the Asia Pacific data center cooling fans market is segmented into hyperscale data center, colocation data center, wholesale data center, enterprise data center, and edge data center. The hyperscale data center segment held the largest market share in 2023.

By country, the Asia Pacific data center cooling fans market is segmented into Australia, China, India, Japan, South Korea, and the Rest of Asia Pacific. The Rest of Asia Pacific dominated the Asia Pacific data center cooling fans market share in 2023.

Blauberg Ventilatoren GmbH; Canarm Ltd; ebm-papst; Hangzhou Kiron Motor Co., Ltd.; Hidria d.o.o.; Multi-Wing Group A/S; Nidec Corp; Ningbo Longwell Electric Technology Co., Ltd.; NOVENCO Building & Industry A/S; PBM Motor and Fan (Suzhou) Co Ltd; Regal Rexnord Corp; Rosenberg Ventilatoren GmbH; Systemair AB; Transmonk India Pvt. Ltd.; TWIN CITY FAN; and ZIEHL-ABEGG SE are some of the leading companies operating in the Asia Pacific data center cooling fans market.

Reason to buy

Save and reduce time carrying out entry-level research by identifying the growth, size, leading players, and segments in the Asia Pacific data center cooling fans market.

Highlights key business priorities in order to assist companies to realign their business strategies.

The key findings and recommendations highlight crucial progressive industry

trends in the Asia Pacific data center cooling fans market, thereby allowing players across the value chain to develop effective long-term strategies.

Develop/modify business expansion plans by using substantial growth offering developed and emerging markets.

Scrutinize in-depth Asia Pacific market trends and outlook coupled with the factors driving the Asia Pacific data center cooling fans market, as well as those hindering it.

Enhance the decision-making process by understanding the strategies that underpin commercial interest with respect to client products, segmentation, pricing, and distribution.

The List of Companies - Asia Pacific Data Center Cooling Fans Market

Blauberg Ventilatoren GmbH

Canarm Ltd

ebm-papst

Hangzhou Kiron Motor Co., Ltd.

Hidria d.o.o.

Multi-Wing Group A/S

Nidec Corp

Ningbo Longwell Electric Technology Co., Ltd.

NOVENCO Building & Industry A/S

PBM Motor and Fan (Suzhou) Co Ltd

Regal Rexnord Corp

Rosenberg Ventilatoren GmbH

Systemair AB

Transmonk India Pvt. Ltd.

TWIN CITY FAN

ZIEHL-ABEGG SE

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