

Asia Pacific Data Center Cooling Market Report (2021-2031) by Scope, Segmentation, Dynamics, and Competitive Analysis

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Abstracts

The Asia Pacific data center cooling market is projected to grow significantly, reaching approximately US\$ 10,645.55 million by 2031, up from US\$ 2,769.64 million in 2023, with a compound annual growth rate (CAGR) of 18.3% during this period.

Executive Summary and Market Analysis

In September 2021, Vantage Data Centers, a leading global provider of hyperscale data center campuses, made a strategic entry into the Asia Pacific market through two acquisitions. This expansion was bolstered by a substantial equity investment of US\$ 1.5 billion from DigitalBridge Investment Management and other investors. Vantage aims to provide data center services in major cities such as Tokyo, Osaka, Melbourne, Hong Kong, and Kuala Lumpur, focusing on the needs of hyperscale, cloud, and large enterprise clients. This move is expected to significantly influence the growth of the data center cooling market in the region.

The demand for sustainable and energy-efficient cooling solutions is increasingly critical in Asia Pacific. Cooling systems account for a large portion of total energy consumption in data centers, prompting a shift from traditional air-based cooling to more efficient liquid cooling systems. This transition is driven by the advantages of lower operational costs, reduced environmental impact, and easier maintenance associated with liquid cooling technologies.

Market Segmentation Analysis

The Asia Pacific data center cooling market can be segmented by component, cooling type, data center type, and industry vertical:

Component: The market includes air conditioning systems, chillers, air handling units, cooling towers, heat exchangers, humidifiers, and others. In 2023, air conditioning systems held the largest market share.

Cooling Type: The market is divided into room-based cooling, row-based cooling, and rack-based cooling, with room-based cooling leading in market share in 2023.

Data Center Type: Segmentation includes hyperscale, colocation, wholesale, and enterprise data centers, with hyperscale data centers dominating the market in 2023.

Industry Vertical: The market is categorized into IT and telecom, BFSI, healthcare, manufacturing, government and defense, media and entertainment, retail, energy, and others, with IT and telecom holding the largest share in 2023.

Market Outlook

The future of data center cooling is likely to be shaped by AI-optimized cooling solutions as organizations strive to manage the heat generated by advanced technologies like AI, machine learning, and edge computing. This trend is essential for maintaining optimal temperatures for high-density equipment, which traditional cooling systems struggle to achieve. AI-optimized cooling systems utilize artificial intelligence to monitor and adjust cooling in real-time, enhancing energy efficiency and hardware reliability. For example, in 2024, Eaton introduced SmartRack modular data center solutions that integrate IT racks, cooling, and service enclosures, addressing the growing need for machine learning and AI integration. Additionally, Asetek and Fabric8Labs announced a partnership to develop the AI-Optimized Cold Plate, a groundbreaking liquid cooling solution unveiled at Computex 2024, aimed at enhancing performance and efficiency.

Noise pollution from cooling systems is a significant concern in data centers, primarily due to the noise generated by compressors and fans. Many operators are considering liquid immersion cooling as a quieter alternative. For those not ready to adopt

immersion cooling, optimizing airflow can effectively reduce noise from traditional cooling systems.

Country Insights

The Asia Pacific data center cooling market includes key countries such as China, India, Australia, Japan, South Korea, and others, with China holding the largest market share in 2023. Major cities like Shanghai, Beijing, Guangzhou, Shenzhen, and Chengdu are pivotal for data center infrastructure and colocation services. China has 92 data center facilities, with Equinix and iAdvantage being the leading providers. The country is exploring innovative cooling solutions, such as ocean cooling, to lower costs and reduce reliance on traditional energy sources. The demand for cooling solutions in China is driven by the rapid adoption of cloud computing, big data, AI, and IoT, leading to increased use of economizer systems, liquid cooling, and other advanced cooling technologies.

Company Profiles

Key players in the Asia Pacific data center cooling market include Asetek, Mitsubishi Corp, Stulz SpA, Vertiv Group Corp, Aspen Systems, Daikin Industries, Delta Electronics, Danfoss, Motivair, Madison Industries, Fujitsu, Rittal, Schneider Electric, Trane Technologies, Black Box, Carrier Global, Alfa Laval, Hewlett Packard Enterprise, Boyd Corp, and Evapco. These companies are pursuing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:

4. ASIA PACIFIC DATA CENTER COOLING MARKET LANDSCAPE

- 4.1 Overview
- 4.2 PEST Analysis
- 4.3 Ecosystem Analysis
- 4.4 List of Vendors in the Value Chain

5. ASIA PACIFIC DATA CENTER COOLING MARKET - KEY MARKET DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Increasing Demand for Compute-Intensive Workloads
 - 5.1.2 Rising Investments in Data Centers
- 5.2 Market Restraints
 - 5.2.1 High Cost Associated with Data Center Cooling
- 5.3 Market Opportunities
 - 5.3.1 Advancements in Liquid Cooling Technologies
 - 5.3.2 Growing Incorporation of Data Center Cooling Robots

5.4 Trends

5.4.1 AI-Optimized Cooling and Quieter Cooling Solutions

5.5 Impact of Drivers and Restraints:

6. DATA CENTER COOLING MARKET - ASIA PACIFIC ANALYSIS

6.1 Asia Pacific Data Center Cooling Market Revenue (US\$ Million), 2021-2031

6.2 Asia Pacific Data Center Cooling Market Forecast Analysis

7. ASIA PACIFIC DATA CENTER COOLING MARKET ANALYSIS - BY COMPONENT

7.1 Air Conditioning System

7.1.1 Overview

7.1.2 Air Conditioning System: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

7.2 Chillers

7.2.1 Overview

7.2.2 Chillers: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

7.3 Air Handling Units

7.3.1 Overview

7.3.2 Air Handling Units: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

7.4 Cooling Towers

7.4.1 Overview

7.4.2 Cooling Towers: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

7.5 Heat Exchangers

7.5.1 Overview

7.5.2 Heat Exchangers: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

7.6 Humidifiers

7.6.1 Overview

7.6.2 Humidifiers: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

7.7 Others

7.7.1 Overview

7.7.2 Others: Asia Pacific Data Center Cooling Market - Revenue and Forecast,

2021-2031 (US\$ Million)

8. ASIA PACIFIC DATA CENTER COOLING MARKET ANALYSIS - BY COOLING TYPE

8.1 Room Based Cooling

8.1.1 Overview

8.1.2 Room Based Cooling: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

8.2 Row Based Cooling

8.2.1 Overview

8.2.2 Row Based Cooling: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

8.3 Rack Based Cooling

8.3.1 Overview

8.3.2 Rack Based Cooling: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9. ASIA PACIFIC DATA CENTER COOLING MARKET ANALYSIS - BY DATA CENTER TYPE

9.1 Hyperscale Data Center

9.1.1 Overview

9.1.2 Hyperscale Data Center: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.2 Colocation Data Center

9.2.1 Overview

9.2.2 Colocation Data Center: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.3 Wholesale Data Center

9.3.1 Overview

9.3.2 Wholesale Data Center: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.4 Enterprise Data Center

9.4.1 Overview

9.4.2 Enterprise Data Center: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10. ASIA PACIFIC DATA CENTER COOLING MARKET ANALYSIS - BY INDUSTRY

VERTICAL

10.1 IT and Telecom

10.1.1 Overview

10.1.2 IT and Telecom: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.2 BFSI

10.2.1 Overview

10.2.2 BFSI: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.3 Healthcare

10.3.1 Overview

10.3.2 Healthcare: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.4 Manufacturing

10.4.1 Overview

10.4.2 Manufacturing: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.5 Government and Defense

10.5.1 Overview

10.5.2 Government and Defense: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.6 Media and Entertainment

10.6.1 Overview

10.6.2 Media and Entertainment: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.7 Retail

10.7.1 Overview

10.7.2 Retail: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.8 Energy

10.8.1 Overview

10.8.2 Energy: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.9 Others

10.9.1 Overview

10.9.2 Others: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

11. ASIA PACIFIC DATA CENTER COOLING MARKET - COUNTRY ANALYSIS

11.1 Asia Pacific

11.1.1 Asia Pacific Data Center Cooling Market Overview

11.1.2 Asia Pacific Data Center Cooling Market - Revenue and Forecast Analysis - by Country

11.1.2.1 Asia Pacific Data Center Cooling Market - Revenue and Forecast Analysis - by Country

11.1.2.2 China: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

11.1.2.2.1 China: Asia Pacific Data Center Cooling Market Share - by Component

11.1.2.2.2 China: Asia Pacific Data Center Cooling Market Share - by Cooling Type

11.1.2.2.3 China: Asia Pacific Data Center Cooling Market Share - by Data Center Type

11.1.2.2.4 China: Asia Pacific Data Center Cooling Market Share - by Industry Vertical

11.1.2.3 India: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

11.1.2.3.1 India: Asia Pacific Data Center Cooling Market Share - by Component

11.1.2.3.2 India: Asia Pacific Data Center Cooling Market Share - by Cooling Type

11.1.2.3.3 India: Asia Pacific Data Center Cooling Market Share - by Data Center Type

11.1.2.3.4 India: Asia Pacific Data Center Cooling Market Share - by Industry Vertical

11.1.2.4 Australia: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

11.1.2.4.1 Australia: Asia Pacific Data Center Cooling Market Share - by Component

11.1.2.4.2 Australia: Asia Pacific Data Center Cooling Market Share - by Cooling Type

11.1.2.4.3 Australia: Asia Pacific Data Center Cooling Market Share - by Data Center Type

11.1.2.4.4 Australia: Asia Pacific Data Center Cooling Market Share - by Industry Vertical

11.1.2.5 Japan: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

11.1.2.5.1 Japan: Asia Pacific Data Center Cooling Market Share - by Component

11.1.2.5.2 Japan: Asia Pacific Data Center Cooling Market Share - by Cooling Type

11.1.2.5.3 Japan: Asia Pacific Data Center Cooling Market Share - by Data Center Type

11.1.2.5.4 Japan: Asia Pacific Data Center Cooling Market Share - by Industry Vertical

Vertical

11.1.2.6 South Korea: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

11.1.2.6.1 South Korea: Asia Pacific Data Center Cooling Market Share - by Component

11.1.2.6.2 South Korea: Asia Pacific Data Center Cooling Market Share - by Cooling Type

11.1.2.6.3 South Korea: Asia Pacific Data Center Cooling Market Share - by Data Center Type

11.1.2.6.4 South Korea: Asia Pacific Data Center Cooling Market Share - by Industry

Vertical

11.1.2.7 Rest of APAC: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

11.1.2.7.1 Rest of APAC: Asia Pacific Data Center Cooling Market Share - by Component

11.1.2.7.2 Rest of APAC: Asia Pacific Data Center Cooling Market Share - by Cooling Type

11.1.2.7.3 Rest of APAC: Asia Pacific Data Center Cooling Market Share - by Data Center Type

11.1.2.7.4 Rest of APAC: Asia Pacific Data Center Cooling Market Share - by Industry

12. COMPETITIVE LANDSCAPE

12.1 Heat Map Analysis by Key Players

12.2 Company Positioning and Concentration

13. INDUSTRY LANDSCAPE

13.1 Overview

13.2 Market Initiative

13.3 Product Development

13.4 Mergers & Acquisitions

14. COMPANY PROFILES

14.1 Asetek, Inc

14.1.1 Key Facts

14.1.2 Business Description

- 14.1.3 Products and Services
- 14.1.4 Financial Overview
- 14.1.5 SWOT Analysis
- 14.1.6 Key Developments
- 14.2 Mitsubishi Corp
 - 14.2.1 Key Facts
 - 14.2.2 Business Description
 - 14.2.3 Products and Services
 - 14.2.4 Financial Overview
 - 14.2.5 SWOT Analysis
 - 14.2.6 Key Developments
- 14.3 Stulz SpA
 - 14.3.1 Key Facts
 - 14.3.2 Business Description
 - 14.3.3 Products and Services
 - 14.3.4 Financial Overview
 - 14.3.5 SWOT Analysis
 - 14.3.6 Key Developments
- 14.4 Vertiv Group Corp.
 - 14.4.1 Key Facts
 - 14.4.2 Business Description
 - 14.4.3 Products and Services
 - 14.4.4 Financial Overview
 - 14.4.5 SWOT Analysis
 - 14.4.6 Key Developments
- 14.5 Aspen Systems, LLC.
 - 14.5.1 Key Facts
 - 14.5.2 Business Description
 - 14.5.3 Products and Services
 - 14.5.4 Financial Overview
 - 14.5.5 SWOT Analysis
 - 14.5.6 Key Developments
- 14.6 Daikin Industries Ltd
 - 14.6.1 Key Facts
 - 14.6.2 Business Description
 - 14.6.3 Products and Services
 - 14.6.4 Financial Overview
 - 14.6.5 SWOT Analysis
 - 14.6.6 Key Developments

- 14.7 Delta Electronics Inc
 - 14.7.1 Key Facts
 - 14.7.2 Business Description
 - 14.7.3 Products and Services
 - 14.7.4 Financial Overview
 - 14.7.5 SWOT Analysis
 - 14.7.6 Key Developments
- 14.8 Danfoss AS
 - 14.8.1 Key Facts
 - 14.8.2 Business Description
 - 14.8.3 Products and Services
 - 14.8.4 Financial Overview
 - 14.8.5 SWOT Analysis
 - 14.8.6 Key Developments
- 14.9 Motivair Corporation
 - 14.9.1 Key Facts
 - 14.9.2 Business Description
 - 14.9.3 Products and Services
 - 14.9.4 Financial Overview
 - 14.9.5 SWOT Analysis
 - 14.9.6 Key Developments
- 14.10 Madison Industries
 - 14.10.1 Key Facts
 - 14.10.2 Business Description
 - 14.10.3 Products and Services
 - 14.10.4 Financial Overview
 - 14.10.5 SWOT Analysis
 - 14.10.6 Key Developments
- 14.11 Fujitsu Ltd
 - 14.11.1 Key Facts
 - 14.11.2 Business Description
 - 14.11.3 Products and Services
 - 14.11.4 Financial Overview
 - 14.11.5 SWOT Analysis
 - 14.11.6 Key Developments
- 14.12 Rittal GmbH & Co KG
 - 14.12.1 Key Facts
 - 14.12.2 Business Description
 - 14.12.3 Products and Services

- 14.12.4 Financial Overview
- 14.12.5 SWOT Analysis
- 14.12.6 Key Developments
- 14.13 Schneider Electric SE
 - 14.13.1 Key Facts
 - 14.13.2 Business Description
 - 14.13.3 Products and Services
 - 14.13.4 Financial Overview
 - 14.13.5 SWOT Analysis
 - 14.13.6 Key Developments
- 14.14 Trane Technologies Plc
 - 14.14.1 Key Facts
 - 14.14.2 Business Description
 - 14.14.3 Products and Services
 - 14.14.4 Financial Overview
 - 14.14.5 SWOT Analysis
 - 14.14.6 Key Developments
- 14.15 Black Box Corporation
 - 14.15.1 Key Facts
 - 14.15.2 Business Description
 - 14.15.3 Products and Services
 - 14.15.4 Financial Overview
 - 14.15.5 SWOT Analysis
 - 14.15.6 Key Developments
- 14.16 Carrier Global Corp
 - 14.16.1 Key Facts
 - 14.16.2 Business Description
 - 14.16.3 Products and Services
 - 14.16.4 Financial Overview
 - 14.16.5 SWOT Analysis
 - 14.16.6 Key Developments
- 14.17 Alfa Laval AB
 - 14.17.1 Key Facts
 - 14.17.2 Business Description
 - 14.17.3 Products and Services
 - 14.17.4 Financial Overview
 - 14.17.5 SWOT Analysis
 - 14.17.6 Key Developments
- 14.18 Hewlett Packard Enterprise Development LP

- 14.18.1 Key Facts
- 14.18.2 Business Description
- 14.18.3 Products and Services
- 14.18.4 Financial Overview
- 14.18.5 SWOT Analysis
- 14.18.6 Key Developments
- 14.19 Boyd Corp
 - 14.19.1 Key Facts
 - 14.19.2 Business Description
 - 14.19.3 Products and Services
 - 14.19.4 Financial Overview
 - 14.19.5 SWOT Analysis
 - 14.19.6 Key Developments
- 14.20 Evapco Inc
 - 14.20.1 Key Facts
 - 14.20.2 Business Description
 - 14.20.3 Products and Services
 - 14.20.4 Financial Overview
 - 14.20.5 SWOT Analysis
 - 14.20.6 Key Developments

15. APPENDIX

- 15.1 About Us
- 15.2 List of Abbreviations

List Of Tables

LIST OF TABLES

Table 1. Asia Pacific Data Center Cooling Market Segmentation

Table 2. List of Vendors

Table 3. Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Table 4. Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Component

Table 5. Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Cooling Type

Table 6. Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Data Center Type

Table 7. Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Industry Vertical

Table 8. Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Country

Table 9. China: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 10. China: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Cooling Type

Table 11. China: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Data Center Type

Table 12. China: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Industry Vertical

Table 13. India: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 14. India: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Cooling Type

Table 15. India: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Data Center Type

Table 16. India: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Industry Vertical

Table 17. Australia: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 18. Australia: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Cooling Type

Table 19. Australia: Asia Pacific Data Center Cooling Market - Revenue and Forecast,

2021 - 2031(US\$ Million) - by Data Center Type

Table 20. Australia: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Industry Vertical

Table 21. Japan: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 22. Japan: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Cooling Type

Table 23. Japan: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Data Center Type

Table 24. Japan: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Industry Vertical

Table 25. South Korea: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 26. South Korea: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Cooling Type

Table 27. South Korea: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Data Center Type

Table 28. South Korea: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Industry Vertical

Table 29. Rest of APAC: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 30. Rest of APAC: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Cooling Type

Table 31. Rest of APAC: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Data Center Type

Table 32. Rest of APAC: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Industry Vertical

Table 33. List of Abbreviations

List Of Figures

LIST OF FIGURES

Figure 1. Asia Pacific Data Center Cooling Market Segmentation - Country

Figure 2. PEST Analysis

Figure 3. Asia Pacific Data Center Cooling Market - Key Market Dynamics

Figure 4. Impact Analysis of Drivers and Restraints

Figure 5. Asia Pacific Data Center Cooling Market Revenue (US\$ Million), 2021-2031

Figure 6. Asia Pacific Data Center Cooling Market Share (%) - by Component (2023 and 2031)

Figure 7. Air Conditioning System: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 8. Chillers: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 9. Air Handling Units: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 10. Cooling Towers: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 11. Heat Exchangers: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 12. Humidifiers: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 13. Others: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 14. Asia Pacific Data Center Cooling Market Share (%) - by Cooling Type (2023 and 2031)

Figure 15. Room Based Cooling: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 16. Row Based Cooling: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 17. Rack Based Cooling: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 18. Asia Pacific Data Center Cooling Market Share (%) - by Data Center Type (2023 and 2031)

Figure 19. Hyperscale Data Center: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 20. Colocation Data Center: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

- Figure 21. Wholesale Data Center: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 22. Enterprise Data Center: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 23. Asia Pacific Data Center Cooling Market Share (%) - by Industry Vertical (2023 and 2031)
- Figure 24. IT and Telecom: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 25. BFSI: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 26. Healthcare: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 27. Manufacturing: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 28. Government and Defense: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 29. Media and Entertainment: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 30. Retail: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 31. Energy: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 32. Others: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 33. Asia Pacific Data Center Cooling Market Breakdown, by Key Countries, 2023 and 2031 (%)
- Figure 34. China: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021- 2031 (US\$ Million)
- Figure 35. India: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021- 2031 (US\$ Million)
- Figure 36. Australia: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021- 2031 (US\$ Million)
- Figure 37. Japan: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021- 2031 (US\$ Million)
- Figure 38. South Korea: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021- 2031 (US\$ Million)
- Figure 39. Rest of APAC: Asia Pacific Data Center Cooling Market - Revenue and Forecast, 2021- 2031 (US\$ Million)
- Figure 40. Heat Map Analysis by Key Players

Figure 41. Company Positioning and Concentration

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