

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

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## Abstracts

The European data center cooling market is projected to grow significantly, reaching approximately US\$ 12,922.91 million by 2031, up from US\$ 3,639.56 million in 2023, reflecting a compound annual growth rate (CAGR) of 17.2% during this period.

## Executive Summary and Market Analysis

The growth of the data center cooling market in Europe is driven by innovative strategies from leading companies like OVHcloud, a major European cloud service provider. With over 20 years of experience, OVHcloud has pioneered sustainable and energy-efficient cooling solutions, utilizing proprietary liquid-cooled servers across its 34 data centers worldwide, which host over 450,000 servers. This focus on energy efficiency aligns with the rising demand for advanced cooling technologies in European data centers, significantly contributing to the market's anticipated growth. OVHcloud's commitment to sustainability and its substantial presence in the European cloud sector position it as a key player in the evolving data center cooling landscape.

In March 2024, OVHcloud announced a partnership with DATA4, emphasizing the importance of sustainable cooling solutions in Europe. This collaboration aims to implement OVHcloud's unique liquid cooling technology, showcasing the industry's commitment to efficient data center cooling practices.

## Market Segmentation Analysis

The Europe data center cooling market can be segmented based on components, cooling types, data center types, and industry verticals:

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

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

**Industry Vertical Segmentation:** The market spans various sectors, including 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 integration of AI and machine learning across industries is enhancing customer experiences, improving cybersecurity, and transforming business processes. The demand for robust infrastructure to support these technologies is increasing, particularly for compute-intensive applications. For example, Lenovo's recent launch of AI-centric infrastructure solutions aims to support demanding workloads across various sectors, including financial services and healthcare. Similarly, NVIDIA's introduction of the Blackwell GPU architecture, featuring 208 billion transistors, highlights the need for advanced cooling solutions due to the heat generated by powerful chips.

As organizations accumulate vast amounts of data, the need for advanced tools to convert this data into actionable insights becomes critical. The evolution of computing hardware has been a response to the growing demands for data processing and analytics, leading to increased power consumption and heat generation in data centers. Consequently, the rising temperatures in data centers underscore the importance of liquid cooling technologies to address these thermal challenges, further driving the

demand for cooling solutions.

## **Country Insights**

The European data center cooling market includes key countries such as the UK, Germany, France, the Netherlands, Italy, Russia, and others, with the UK holding the largest market share in 2023. Notable developments in the UK include Mercury Engineering's contributions to data center facilities, such as Equinix's LD10 Data Center in London. Additionally, CGG's inauguration of a high-performance computing hub in Southeast England, featuring immersion cooling infrastructure powered entirely by renewable energy, exemplifies the commitment to sustainable practices in the region.

## **Company Profiles**

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

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