

Middle East & Africa Data Center Cooling Market Report (2021-2031) by Scope, Segmentation, Dynamics, and Competitive Analysis

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Abstracts

The data center cooling market in the Middle East and Africa (MEA) is projected to grow significantly, reaching approximately USD 1,695.34 million by 2031, up from USD 584.19 million in 2023, with a compound annual growth rate (CAGR) of 14.2% during the forecast period.

Executive Summary and Market Analysis

The MEA region is experiencing substantial advancements and investments in data center cooling technologies. A notable development occurred in May 2022 when Microsoft Corp. partnered with G42 to invest in Kenya, committing USD 1 billion to various digital initiatives, including the establishment of a cutting-edge green data center to support Microsoft Azure in East Africa. This initiative emphasizes technological progress and environmental sustainability, utilizing renewable energy sources for data center operations, which is expected to enhance the adoption of cooling systems in the region.

The growth of the data center cooling market in MEA is further supported by economic development and increased investments in the information and communications technology (ICT) sector. These trends highlight the region's dedication to implementing advanced cooling technologies to meet the evolving demands of data center operations and facilitate digital transformation.

Market Segmentation Analysis

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

1. **Components:** The market is divided into air conditioning systems, chillers, air handling units, cooling towers, heat exchangers, humidifiers, and others. In 2023, air conditioning systems held the largest market share.
2. **Cooling Types:** The market is categorized into room-based cooling, row-based cooling, and rack-based cooling, with room-based cooling leading in market share in 2023.
3. **Data Center Types:** The market includes hyperscale data centers, colocation data centers, wholesale data centers, and enterprise data centers, with hyperscale data centers dominating the market in 2023.
4. **Industry Verticals:** The market is segmented into IT and telecom, banking, financial services and insurance (BFSI), healthcare, manufacturing, government and defense, media and entertainment, retail, energy, and others. The IT and telecom sector held the largest share in 2023.

Market Outlook

Liquid cooling has emerged as a preferred solution for high-performance computing (HPC) and data center operations. This technology reduces the need for continuous air circulation, significantly lowering utility consumption and enhancing energy efficiency. Currently, around 40% of data centers are utilizing liquid cooling technologies. Companies are forming strategic partnerships to advance these technologies. For example, in September 2023, Mitsubishi Heavy Industries (MHI) and ZutaCore, Inc. announced a partnership to develop sustainable liquid cooling solutions aimed at achieving energy efficiency and zero emissions. This collaboration combines ZutaCore's HyperCool technology, a waterless direct-on-chip liquid cooling solution, with MHI's extensive product offerings, promising significant benefits in computing power, cost reduction, and heat reuse.

In 2024, STULZ plans to launch the CyberCool CMU, a coolant management and distribution unit designed to optimize heat exchange efficiency in liquid cooling systems. This innovative product will be showcased at Data Centre World Frankfurt 2024,

highlighting the ongoing efforts to tackle heat challenges in data centers and meet the demands of various sectors. The advancements in liquid cooling technologies are expected to create significant growth opportunities for the data center cooling market in the coming years.

Country Insights

The MEA data center cooling market includes key countries such as the UAE, Saudi Arabia, South Africa, and the Rest of MEA, with the latter holding the largest market share in 2023. Countries like Israel and Egypt are pivotal in this segment, driven by collaborative initiatives among companies. For instance, in December 2023, Nutanix and Raya Data Centers signed a Memorandum of Understanding to provide tailored cloud computing solutions for public and enterprise sectors in Egypt. The growth of the data center cooling market in these countries is fueled by increased government and private sector focus on developing data centers and enhancing cloud computing services.

Company Profiles

Key players in the MEA data center cooling market include Asetek, Mitsubishi Corp, Stulz SpA, Vertiv Group Corp., Aspen Systems, Daikin Industries, Delta Electronics, Danfoss, Motivair Corporation, and others. These companies are pursuing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to consumers.

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. MIDDLE EAST & AFRICA 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. MIDDLE EAST & AFRICA 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 - MIDDLE EAST & AFRICA ANALYSIS

- 6.1 Middle East & Africa Data Center Cooling Market Revenue (US\$ Million), 2021-2031
- 6.2 Middle East & Africa Data Center Cooling Market Forecast Analysis

7. MIDDLE EAST & AFRICA DATA CENTER COOLING MARKET ANALYSIS - BY COMPONENT

- 7.1 Air Conditioning System
 - 7.1.1 Overview
 - 7.1.2 Air Conditioning System: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- 7.2 Chillers
 - 7.2.1 Overview
 - 7.2.2 Chillers: Middle East & Africa 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: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- 7.4 Cooling Towers
 - 7.4.1 Overview
 - 7.4.2 Cooling Towers: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- 7.5 Heat Exchangers
 - 7.5.1 Overview
 - 7.5.2 Heat Exchangers: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- 7.6 Humidifiers
 - 7.6.1 Overview
 - 7.6.2 Humidifiers: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- 7.7 Others
 - 7.7.1 Overview

7.7.2 Others: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

8. MIDDLE EAST & AFRICA DATA CENTER COOLING MARKET ANALYSIS - BY COOLING TYPE

8.1 Room Based Cooling

8.1.1 Overview

8.1.2 Room Based Cooling: Middle East & Africa 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: Middle East & Africa 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: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9. MIDDLE EAST & AFRICA DATA CENTER COOLING MARKET ANALYSIS - BY DATA CENTER TYPE

9.1 Hyperscale Data Center

9.1.1 Overview

9.1.2 Hyperscale Data Center: Middle East & Africa 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: Middle East & Africa 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: Middle East & Africa 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: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10. MIDDLE EAST & AFRICA DATA CENTER COOLING MARKET ANALYSIS - BY INDUSTRY VERTICAL

10.1 IT and Telecom

10.1.1 Overview

10.1.2 IT and Telecom: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.2 BFSI

10.2.1 Overview

10.2.2 BFSI: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.3 Healthcare

10.3.1 Overview

10.3.2 Healthcare: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.4 Manufacturing

10.4.1 Overview

10.4.2 Manufacturing: Middle East & Africa 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: Middle East & Africa 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: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.7 Retail

10.7.1 Overview

10.7.2 Retail: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.8 Energy

10.8.1 Overview

10.8.2 Energy: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

10.9 Others

10.9.1 Overview

10.9.2 Others: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

11. MIDDLE EAST & AFRICA DATA CENTER COOLING MARKET - COUNTRY ANALYSIS

11.1 Middle East & Africa

11.1.1 Middle East and Africa Data Center Cooling Market Overview

11.1.2 Middle East & Africa Data Center Cooling Market - Revenue and Forecast Analysis - by Country

11.1.2.1 Middle East & Africa Data Center Cooling Market - Revenue and Forecast Analysis - by Country

11.1.2.2 United Arab Emirates: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

11.1.2.2.1 United Arab Emirates: Middle East & Africa Data Center Cooling Market Share - by Component

11.1.2.2.2 United Arab Emirates: Middle East & Africa Data Center Cooling Market Share - by Cooling Type

11.1.2.2.3 United Arab Emirates: Middle East & Africa Data Center Cooling Market Share - by Data Center Type

11.1.2.2.4 United Arab Emirates: Middle East & Africa Data Center Cooling Market Share - by Industry Vertical

11.1.2.3 Saudi Arabia: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

11.1.2.3.1 Saudi Arabia: Middle East & Africa Data Center Cooling Market Share - by Component

11.1.2.3.2 Saudi Arabia: Middle East & Africa Data Center Cooling Market Share - by Cooling Type

11.1.2.3.3 Saudi Arabia: Middle East & Africa Data Center Cooling Market Share - by Data Center Type

11.1.2.3.4 Saudi Arabia: Middle East & Africa Data Center Cooling Market Share - by Industry Vertical

11.1.2.4 South Africa: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

11.1.2.4.1 South Africa: Middle East & Africa Data Center Cooling Market Share - by Component

11.1.2.4.2 South Africa: Middle East & Africa Data Center Cooling Market Share - by Cooling Type

11.1.2.4.3 South Africa: Middle East & Africa Data Center Cooling Market Share - by Data Center Type

11.1.2.4.4 South Africa: Middle East & Africa Data Center Cooling Market Share - by

Industry Vertical

11.1.2.5 Rest of Middle East & Africa: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

11.1.2.5.1 Rest of Middle East & Africa: Middle East & Africa Data Center Cooling Market Share - by Component

11.1.2.5.2 Rest of Middle East & Africa: Middle East & Africa Data Center Cooling Market Share - by Cooling Type

11.1.2.5.3 Rest of Middle East & Africa: Middle East & Africa Data Center Cooling Market Share - by Data Center Type

11.1.2.5.4 Rest of Middle East & Africa: Middle East & Africa Data Center Cooling Market Share - by Industry Vertical

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. Middle East & Africa Data Center Cooling Market Segmentation

Table 2. List of Vendors

Table 3. Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Table 4. Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Component

Table 5. Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Cooling Type

Table 6. Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Data Center Type

Table 7. Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Industry Vertical

Table 8. Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Country

Table 9. United Arab Emirates: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 10. United Arab Emirates: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Cooling Type

Table 11. United Arab Emirates: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Data Center Type

Table 12. United Arab Emirates: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Industry Vertical

Table 13. Saudi Arabia: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 14. Saudi Arabia: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Cooling Type

Table 15. Saudi Arabia: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Data Center Type

Table 16. Saudi Arabia: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Industry Vertical

Table 17. South Africa: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 18. South Africa: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Cooling Type

Table 19. South Africa: Middle East & Africa Data Center Cooling Market - Revenue and

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

Table 20. South Africa: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Industry Vertical

Table 21. Rest of Middle East & Africa: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Component

Table 22. Rest of Middle East & Africa: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Cooling Type

Table 23. Rest of Middle East & Africa: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Data Center Type

Table 24. Rest of Middle East & Africa: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Industry Vertical

Table 25. List of Abbreviations

List Of Figures

LIST OF FIGURES

Figure 1. Middle East & Africa Data Center Cooling Market Segmentation - Country

Figure 2. PEST Analysis

Figure 3. Middle East & Africa Data Center Cooling Market - Key Market Dynamics

Figure 4. Impact Analysis of Drivers and Restraints

Figure 5. Middle East & Africa Data Center Cooling Market Revenue (US\$ Million), 2021-2031

Figure 6. Middle East & Africa Data Center Cooling Market Share (%) - by Component (2023 and 2031)

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

Figure 8. Chillers: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

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

Figure 10. Cooling Towers: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 11. Heat Exchangers: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 12. Humidifiers: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 13. Others: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 14. Middle East & Africa Data Center Cooling Market Share (%) - by Cooling Type (2023 and 2031)

Figure 15. Room Based Cooling: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 16. Row Based Cooling: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 17. Rack Based Cooling: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 18. Middle East & Africa Data Center Cooling Market Share (%) - by Data Center Type (2023 and 2031)

Figure 19. Hyperscale Data Center: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 20. Colocation Data Center: Middle East & Africa Data Center Cooling Market -

Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 21. Wholesale Data Center: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 22. Enterprise Data Center: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 23. Middle East & Africa Data Center Cooling Market Share (%) - by Industry Vertical (2023 and 2031)

Figure 24. IT and Telecom: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 25. BFSI: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 26. Healthcare: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 27. Manufacturing: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 28. Government and Defense: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 29. Media and Entertainment: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 30. Retail: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 31. Energy: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 32. Others: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 33. Middle East & Africa Data Center Cooling Market Breakdown, by Key Countries, 2023 and 2031 (%)

Figure 34. United Arab Emirates: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 35. Saudi Arabia: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 36. South Africa: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 37. Rest of Middle East & Africa: Middle East & Africa Data Center Cooling Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 38. Heat Map Analysis by Key Players

Figure 39. Company Positioning and Concentration

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