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Middle East & Africa Data Center Cooling Market: Current Analysis and Forecast (2025-2033)

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Abstracts

Data center cooling is the technologies and measures applied in removing heat created by servers, storage, and networking devices to enable them to work reliably and effectively. With the increased power of IT hardware and rack densities, the heat generated on a per square meter basis has also soared, resulting in cooling becoming a paramount design and operating issue. In modern data centers, air-based systems (CRAC/CRAH units, in-row and rear-door coolers), chilled water plants, containment, and more and more liquid cooling (high-density or AI workloads) are being used. Proper cooling lowers the amount of energy used, enhances the uptime, and has a direct impact on the overall operating costs and sustainability of a facility.

The Middle East & Africa Data Center Cooling market is set to show a growth rate of about 17.9% during the forecast period (2025- 2033F). The data center cooling market in the Middle East and Africa is growing steadily as cloud providers, telecommunications operators, governments, and companies accelerate investments in digital infrastructure. New hyperscale campuses, regional colocation hubs, and edge facilities are being built in the Gulf, South Africa, and major metros in Africa. Concurrently, the high ambient temperatures and increasing rack power densities are putting the focus of data center design on cooling. The operators are no longer content to use the basic comfort cooling but instead continue to shift to purpose-built systems capable of sustaining thermal stability, managing the energy expenses, and supporting future AI and high-performance demands.

According to the component, the Middle East & Africa data center cooling market is split between solutions and services. Among them, the solutions segment is the biggest requirement in revenue at the moment due to the massive investment in chillers, CRAH/CRAC units, in-row cooling, containment,

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and control systems in new hyperscale and colocation centres. Physical cooling infrastructure is most commonly a priority in greenfield construction and large expansions, as it has a direct effect on IT capacity, reliability, and PUE. Moreover, routine upgrades and technological changes to accommodate higher rack densities are further enhancing the prevailing solutions at the expense of pure service-based revenues, while design, integration, and maintenance services are increasingly in demand.

The Middle East & Africa data center cooling market is divided into immersion cooling, cold plate cooling, and spray liquid cooling, based on the type of cooling. AI and high-performance workloads are coming under the focus of immersion cooling, as it can manage extremely high heat densities and use less energy. Incremental upgrades are under consideration to be implemented on existing facilities with cold plate solutions because they are easier to integrate into a traditional rack layout. Spray liquid cooling is also more niche; however, it is important to have a high degree of control over localized cooling and a small volume of space.

According to the type of data center, the Middle East and Africa data center cooling market can be divided into hyperscale, enterprise, colocation, edge data center, and high-performance computing. Hyperscale facilities and colocation are becoming the new demand centers, as global cloud providers and regional operations invest in mega-campuses with high effectiveness and reliability attributes. Retrofit opportunities to increase efficiency of cooling are driven by enterprise data center consolidation and modernization, which in turn drives the direction of the enterprise data center architecture. The edge data centers, which are connected with the implementation of 5G and IoT, need to be compact, resilient, and applicable in remote or harsh environments. Supercomputer centers contribute to the use of new and liquid-based cooling systems even faster.

For a better understanding of the market adoption of Middle East & Africa Data Center Cooling, the market is analyzed based on its presence in countries such as Saudi Arabia, UAE, Egypt, South Africa, Turkey, Israel, and the Rest of the Middle East & Africa. The market of data center cooling in Saudi Arabia is thriving at an impressive pace due to the massive investments in clouds, Digital Vision 2030, and the construction of hyperscale campuses and colocation centers. Very high ambient temperatures necessitate efficient, robust cooling to be a design consideration, and thus, there is a need to have high-tech chiller

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plants, indirect evaporative cooling, close-coupled cooling, and complex controls.

Some major players in the market include Submer, Schneider Electric, Danfoss, CoolIT Systems, NTT Ltd, Dell, Vertiv Group Corp., Asetek, Johnson Controls, and Carrier.

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