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Data Center Cooling Market Research Report – Forecast to 2030

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Description:

Data Center Cooling Market Overview

Data Center Cooling Market Size was valued at USD 14.1 billion in 2022. The Data Center Cooling market is projected to grow from USD 15.5805 Billion in 2023 to USD 28.3631 billion by 2030, exhibiting a compound annual growth rate (CAGR) of 10.50% during the forecast period (2023 - 2030). Diverse industries need innovative technologies, and the rise in demand for energy- and money-saving data centers are the key market drivers enhancing market growth.

Data Center Cooling Market

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Industry News of Data Center Cooling Market

April 2023

Researchers from the Nanyang Technological University in Singapore (NTU Singapore) have developed a more environmentally friendly approach for cooling computers in data centers that might cut energy expenses and carbon emissions by up to 26%.

This innovative technique, created by researchers at NTU, directly cools the CPU without the use of a heatsink by combining two very effective heat-removal processes: boiling and evaporation.

When tropical ambient temperatures (about 30 degrees Celsius) are reached, the gases and extra fluid are collected within an enclosed system, which is condensed into liquid, and then recycled back into the system for usage.

More crucially, since faster speeds would result in higher temperatures, spray cooling has the ability to dissipate more heat than air cooling, enabling CPUs to function faster & perform better over today's speeds, which are constrained by air cooling. The spray-cooling prototype in fact has demonstrated that it can handle rack densities as high as 23 kW per cubic meter and can dissipate substantially more heat.

The project's director, Associate Professor Wong Teck Neng of NTU's School of Mechanical & Aerospace Engineering, claims that the method's high energy efficiency and focused approach are its key advantages. And as opposed to traditional air conditioning systems, this does not require a chiller system.

Data Center Cooling Market Trends

Increase in the usage of smartphones is driving the market growth

Organizations are increasing their investments in constructing new data center facilities due to the ubiquity of cloud services, the rising prominence of big data, and the increased penetration of connected devices. Over the next eight years, it is predicted that all of these factors will favor the demand for data center cooling. As a result, the demand for cooling solutions is directly correlated with an increase in the number of data center facilities worldwide.

The pandemic's increased spending on IT infrastructure is paving the way for new and expanded data center facilities to be built worldwide. Furthermore, software-based data centers are also helping the market CAGR expand by offering a higher level of automation. The pandemic's shift toward digital transformation has increased the demand for scalable, secure, and flexible data center facilities. As a result, the demand for the data center cooling industry is expected to grow as investments in new data center facilities increase. However, it is anticipated that the development of

the data center cooling industry will be constrained by the requirement for specialized infrastructure and high investment costs for setting up and maintaining these data center solutions. During the forecast period, it is also anticipated that cooling problems during power outages, and lower carbon emissions will present difficulties for the data center cooling industry. The data center cooling industry was significantly impacted by COVID-19. A lack of workers and low investment costs hampered the production and sale of data center cooling technology. The government and major market players also adopted new safety measures to advance and improve the practices. Because it targeted the right demographic, the data center cooling industry's sales rate grew as technology developed.

Additionally, data centers serve as a hub for all essential IT infrastructure in various industries, including manufacturing, BFSI, retail, healthcare, etc. Investments in data centers in these industries are primarily motivated by the need to manage enormous volumes of data while providing networking capabilities. However, because data centers generate a lot of heat, they need cooling solutions to keep the system continuously running. Therefore, any data center facility must prioritize data center cooling solutions. Thus, driving the Data Center Cooling market revenue.

Data Center Cooling Market Segment Insights

Data Center Cooling Component Insights

Based on components, the data center cooling market segmentation includes chillers, economizers, and server cooling. The chillers segment dominated the market, and the expansion can be attributed to the demand for chillers, which has increased due to businesses' growing concern over preserving server performance. This is assisting businesses in preserving server performance and has recently enhanced the data center cooling market CAGR globally.

Data Center Cooling Cooling Type Insights

Based on cooling type, the data center cooling market segmentation includes liquid and air. The air segment held the majority share in 2022 concerning the data center cooling market revenue. Flexible scroll compressors with high COP, low noise, and the ability to withstand liquid shock and high pressure are available from Copeland and other well-known brands. These compressors are energy-efficient and high-efficiency. Using top-notch components and cutting-edge manufacturing technology, an effective, high-quality evaporating coil.

Figure 1: Data Center Cooling Market by Cooling Type, 2022 & 2030 (USD billion)

Data Center Cooling Market

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Data Center Cooling Service Insights

Based on the service, the data center cooling market data includes professional service and managed service. The managed service category generated the most income due to the increased use of smartphones. The installation and deployment services can be used by both small and large businesses to deploy cost-effective, energy-efficient data center cooling. They also act as a one-stop shop for simple deployments with little downtime. Organizations worldwide use these services more frequently implants for Data Center cooling, positively impacting the market growth.

Data Center Cooling Organization Size Insights

Based on the organization size, the data center cooling industry includes SMEs and large enterprises. Large enterprises dominate the market holding the maximum market share during the forecasted period. The need for data center cooling has increased due to the rise in data generation and increased demand for data centers.

Data Center Cooling Regional Insights

By region, the study provides market insights into North America, Europe, Asia-Pacific and the Rest of the World. The Asia Pacific Data Center Cooling market will dominate, which is projected to grow in importance over the forecast period as data center cooling applications in the telecom sector are anticipated to rise. This may be attributed to the rise in service providers for external IT infrastructure services that run and manage essential business data and applications. It will boost the market growth in this region.

Further, the major countries studied in the market report are The U.S., Canada, German, France, the UK, Italy, Spain, China, Japan, India, Australia, South Korea, and Brazil.

Figure 2: DATA CENTER COOLING SHARE BY REGION 2022 (%)

Data Center Cooling Market

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Europe's Data Center Cooling market accounts for the second-largest market share. This results from the existence of tech behemoths like Facebook, Google, and Microsoft, which are constantly looking for new and inventive ways to manage their expansion because of the relocation of data

center infrastructure. Further, the German Data Center Cooling market held the largest market share, and the UK Data Center Cooling market was the fastest-growing market in the European region.

The North America Data Center Cooling Market is expected to grow at the fastest CAGR from 2023 to 2030, led the data center cooling solutions market and is anticipated to expand at a CAGR of over 12.7 percent. The presence of technology behemoths like Facebook and Amazon Inc. in the region suggests that new technology-based solutions will be adopted more gradually. Alongside Google Inc., there are many data centers in the area, and several IT firms have opened doors for the data center cooling solutions industry. Moreover, the US Data Center Cooling market held the largest market share, and the Canada Data Center Cooling market was the fastest-growing market in the North American region.

Data Center Cooling Key Market Players & Competitive Insights

Leading market players are investing heavily in research and development to expand their product lines, which will help the Data Center Cooling market grow even more. Market participants are also undertaking various strategic activities to expand their footprint, with important market developments including new product launches, contractual agreements, mergers and acquisitions, higher investments, and collaboration with other organizations. The Data Center Cooling industry must offer cost-effective items to expand and survive in a more competitive and rising market climate.

Manufacturing locally to minimize operational costs is one of the key business tactics manufacturers use in the Data Center Cooling industry to benefit clients and increase the market sector. The Data Center Cooling industry has recently offered some of the most significant medical advantages. Major players in the Data Center Cooling market, including Fujitsu Ltd. (Japan), Asetek A/S (Denmark), The Mitsubishi Group (Japan), Schneider Electric SE (France), Rittal GmbH & Co. KG (Germany), Hitachi Ltd. (Japan), 4energy (UK), 3M (US), Degree Controls (US), Wakefield-Vette Inc. (US), HP Development Company, L.P. (US), The Heico Companies LLC (US) and others, are attempting to increase market demand by investing in research and development operations.

Fujitsu Ltd. (Japan) Aims to increase social trust through innovation to create a more sustainable world. To achieve the Fujitsu Group Purpose, we will improve our capacity to stay abreast of world society while pursuing agile change-making and value creation. With about 130,000 employees supporting customers in 180 countries, we provide a wide range of products, services, and solutions.

Asetek A/S (Denmark), André Eriksen established Asetek in 1997 as a private business, and the company was incorporated in 2000. Asetek quickly dominated the gaming and enthusiast markets. We developed a novel cooling strategy to overcome the performance issues brought on by processors running extremely hot. Our VapoChill made it possible for CPU speeds to increase by deeply freezing them to below-freezing temperatures. Our company pioneered vapor phase CPU cooling technology and rose to the top of the field in just five years. The sealed-loop liquid cooler is a creation of ours. With the help of our all-in-one (AIO) liquid cooling innovations, our OEM partners for high-performance PC and workstations could offer the market better prebuilt. Having a backup plan is a good idea in case something goes wrong. Numerous firsts for the industry are among the innovations, including vapor chamber technology, special pump systems, split flow cold plates, and software that lets the public control and monitor their cooling systems.

Key Companies in the Data Center Cooling market include

- Fujitsu Ltd. (Japan)
- Asetek A/S (Denmark)
- The Mitsubishi Group (Japan)
- Schneider Electric SE (France)
- Rittal GmbH & Co. KG (Germany)
- Hitachi Ltd. (Japan)
- 4energy (UK)
- 3M (US)

- Degree Controls (US)
- Wakefield-Vette Inc. (US)
- HP Development Company
- L.P. (US)
- The Heico Companies LLC (US)

Data Center Cooling Industry Developments

August 2021: The accessibility of "dcTrack" from Sunbird Software was announced. A software program for managing data centers' infrastructure is called dcTrack. As the second generation's industry standard, Sunbird will provide improved features that will automate the data center's power capacity planning.

September 2022: Enhanced and digitized versions of critical facility operations have been integrated into Schneider Electric's data center solutions portfolio, the company announced in August 2019. Service providers and large data center operators are the target markets for these solutions. The solutions give data centers increased operational effectiveness, reduced risk, maximum uptime, and effective IT planning.

January 2021: Open-access internet network provider Chorus announced that it is expanding its Chorus Edgecenter Colocation product in three locations across New Zealand by utilizing cutting-edge infrastructure management software from Nlyte. The demand for high power-driven computing and the rapid expansion of cloud computing drive the demand for data centers to offer latency.

Data Center Cooling Market Segmentation

Data Center Cooling Component Outlook

- Chillers
- Economizer
- Server Cooling

Data Center Cooling Cooling Type Outlook

- Liquid
- Air

Data Center Cooling Service Outlook

- Professional Service
- Managed Service

Data Center Cooling Organization Size Outlook

- SMEs
- Large Enterprises

Data Center Cooling Regional Outlook

- North America
 - US
 - Canada
- Europe
 - Germany
 - France
 - UK
 - Italy
 - Spain
 - Rest of Europe
- Asia-Pacific
 - China
 - Japan
 - India
 - Australia
 - South Korea
 - Australia

- Rest of Asia-Pacific
- Rest of the World
 - Middle East
 - Africa
 - Latin America

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