

Uk Data Center Cooling - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2030

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Report description:

The United Kingdom data center cooling market reached a value of USD 922.1 million in the previous year, and it is further projected to register a CAGR of 3.2% during the forecast period.

Key Highlights

- Data center design companies are starting to consider the historical weather information outmoded and beginning to use projected future temperatures. The World Meteorological Organization (WMO) says there is a 93% chance that one year between now and 2026 will be the hottest on record in the country. Major data centers often have thousands of gallons of water at their disposal for cooling. Such a factor indicates major market demand.
- The upcoming IT load capacity of the United Kingdom data center market is expected to reach 3,600 MW by 2029. The country's construction of raised floor area is expected to increase to 17.8 million sq. ft by 2029.
- The country's total number of racks to be installed is expected to reach 880K units by 2029. London is expected to house the maximum number of racks by 2029.
- There are close to 58 submarine cable systems connecting the United Kingdom, and many are under construction. One such submarine cable that is estimated to start service in 2023 is 2Africa, which stretches over 45,000 km with landing points from Bude, United Kingdom.

Uk Data Center Cooling Market Trends

IT and Telecom to Hold Significant Share

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- The telecommunications industry is looking toward institutionalization to supervise and promote digital transformation, making the process a foundation for developing the digital economy and society. The telecom industry contributes 4-5% of the UK's GDP and plays a vital role in the economic and social well-being of the country. In 2021, inhabitants of the UK made around 187 billion minutes worth of calls over mobile networks compared to about 40 billion minutes over fixed networks.
- As per industry surveys, the percentage of smartphone users looking to upgrade is increasing, with more than 35% intending to upgrade to 5G as of 2022 compared to less than 28% as of 2019. 5G users, on average, consume up to 2.7x more mobile data compared to 4G users, which is expected to increase data traffic congestion. Overall, with increasing traffic, the demand for cooling solutions is increasing in the telecom data center due to high power consumption along with a focus on low carbon emission.
- In March 2021, Green Revolution Cooling (GRC), a leading provider of immersion cooling solutions for data center IT equipment, secured a spot in the Essentia Trading Limited Zero Carbon Delivery Framework (ZCF). This strategic inclusion empowers telecommunications companies to access sustainable and environmentally friendly infrastructure investments, streamlining the process of adopting low and zero-carbon technology solutions.
- In terms of R&D, the UK Telecoms Innovation Network (UKTIN) acts as an information point to access funding or testing facilities for R&D. The technology is considered crucial to the government's GBP 250 million (USD 342.5 million) strategy to lower the barriers for firms seeking to enter the UK telecoms supply chain, which will increase competition and drive up the quality of products. This will increase the surge in data, leading to a major increase in traffic congestion and data center cooling demand.

Liquid Cooling to Hold Significant Growth

- In the United Kingdom, data centers rely heavily on water in order to regulate and maintain internal temperature, especially in facilities using traditional cooling tower methods compared to more efficient hybrid or adiabatic systems.
- Liquids offer a far higher heat capacity than air, and water is 4,000 times more efficient than air. With rack density estimates north of 50kW, this technology offers opportunities to achieve increased energy efficiency across the data center compared with air-cooled sites.
- Hyperscale data centers run by technology giants often use vast amounts of water. Google struck a deal that guarantees it 1 million gallons a day to cool one data center. Because of their large size, they have space to add extra cooling capacity to cope with temperature spikes.
- Thousands of swimming pools in Britain are currently experiencing an energy problem. In order to provide cloud users with an HPC cluster, Deep Green installed a 28 kW system. The technology, which is modeled after Deep Green's own immersion cooling tubs, makes use of oil to absorb heat from the servers and then circulates it through a heat exchanger to warm the pool. Deep Green provides the Exmouth Leisure Centre with free heat while paying for the electricity it consumes.
- The region is witnessing multiple launches, collaborations, partnerships, and innovation activities, which are increasing immersion cooling technology in data centers. In March 2023, a small Edge data center known as a "digital boiler" is being used by a recreational facility in Exmouth, Devon, to supply some of the energy required to heat its swimming pool.
- Furthermore, cloud storage use has expanded over the years, which is likely to raise demand for liquid data center cooling systems. Cloud storage companies like Google and Microsoft are expanding their storage capacity in the country to enable more efficient cloud workflow, which will lead to a major demand for liquid cooling.

Uk Data Center Cooling Industry Overview

The United Kingdom data center cooling market exhibits a moderate level of consolidation among key industry players, having sharpened their competitive edge in recent years. Notable market leaders in this segment include Iceotope Technologies Limited,

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Aermec SPA, FlaktGroup Holding GmbH, and others. These industry giants, boasting significant market shares, are actively engaged in expanding their customer base throughout the region. Their growth strategies primarily hinge on strategic collaborative efforts aimed at enhancing market share and overall profitability.

In March 2022, Johnson Controls made a significant move by harnessing its Silent-Aire solutions to introduce an industry-first hyperscale data center platform specifically tailored to assist cloud providers in achieving ambitious sustainability goals. The Johnson Controls Data Center Solutions platform offers a range of innovative solutions designed to preserve water resources and reduce energy consumption. These solutions encompass air-cooled chillers, liquid cooling systems, combination air handler units, environmentally-friendly refrigerants ready for future use, and prefabricated modular data centers. This development signifies a crucial step towards promoting sustainability and efficiency in the data center cooling industry.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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