Europe Data Center Cooling - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Data Center Cooling Market size is estimated at USD 8.74 billion in 2025, and is expected to reach USD 18.75 billion by 2030, at a CAGR of 16.5% during the forecast period (2025-2030).

The growing adoption of cloud computing among SMEs, government regulations for local data security, and growing investment by domestic players are some of the major factors driving the demand for data center cooling in the region.

Key Highlights
- Cooling technologies are usually selected based on the data centers' geographical location. As companies regularly seek to mitigate costs, energy-efficient cooling methods are being considered the potential alternatives to traditional cooling methods. The market's growth is also fueled by edge computing adoption and the increase in IoT devices.
- Developments in IT Infrastructure in emerging European countries such as Hungary, Greece, Poland, and Turkey are expected to increase the construction of hyperscale data center facilities with over 50 MW power capacity. The United Kingdom, Germany, and France had the highest number of data centers across Europe, and market players can target these countries to invest in their new technologies. Also, they can form partnerships with upcoming data center organizations to cater to market requirements at a competitive price, aiding the growth of the European data center cooling market over the forecast period.
- The cooling systems are responsible for almost 40% of the data center power consumption. Companies are trying to tackle this issue by setting up green data centers. The growing trends toward deploying green data centers for storing, managing, and distributing information have helped many software companies reduce energy consumption and total energy costs. For example, green technologies, such as Immersion4 in combination with AI, are changing how data centers operate to make them more sustainable with efficient energy usage and low carbon footprint. Such green data centers' emergence drives the demand for cooling units in the region.

- Data center cooling systems require a high initial investment to set up, which could restrain the market. However, many local vendors and market players are developing innovative solutions by modifying the existing data centers at a low cost to reduce the cost of setting up a new unit. Additionally, reduced carbon emission and cooling issues during power outages could hamper the growth of the market.
- The COVID-19 pandemic impacted the market owing to lockdowns, shortage of devices, and supply chain disruptions to set up new data centers and update the existing data centers. On the other hand, there is a massive rise in data volume and mobile data usage in European countries, which is anticipated to boost the setup of data centers across Europe. This will propel the market growth over the forecast period. Also, government support is projected to boost the development of the data center cooling market over the forecast period.

Europe Data Center Cooling Market Trends

The Retail Segment is Expected to Hold a Significant Market Share

- In the retail segment, the increasing number of users in e-commerce and online spending is creating an enormous volume of Big Data, which is expected to propel the need for data storage, security, and reduced latency. This boosts the region's expenditure and the number of data centers. Rapid development in the retail sector and Industry 4.0 trends are also responsible for the rise of data centers, enhancing the need for cooling devices.
- Due to the increasing number of online users, foreign retail companies regularly invest in European countries to expand their storage capacity, increasing internet traffic and the load on data centers. For instance, JD.com, a Chinese e-commerce giant, recently confirmed a strategic entry into the European retail sphere. Due to stringent regulations in the region, foreign companies investing in the area may store their data locally for smooth transitions regarding the data protection law. As a result, the usage of data center cooling systems is expected to increase, thereby boosting the market growth in the region over the forecast period.

- Notably, according to the E-commerce Foundation, the European B2C e-commerce turnover is expected to expand by approximately 13% to reach USD 621 billion due to the high internet penetration in the region. It may increase the Big Data volume, leading to more data centers and cooling systems in the area.
- According to Eurostat, Italy and Poland witnessed tremendous growth in e-commerce users. It led to the generation of a vast amount of data, thereby strengthening storage requirements. As a result, the European data center cooling market is expected to grow over the forecast period.

The United Kingdom Accounts For the Largest Market Share

- Companies in the UK are rigorously investing in new data centers, and this is expected to positively impact the market growth in the region over the forecast period. For instance, Interxion, a European colocation and networking company, commenced its third data center in London, expanding carriers and CDNs for consumers. This development is expected to propel cooling system utilization and foster market growth.
- H&M, a fashion retailer in the country, plans to integrate a cooling and heat recovery system in its new data center in Stockholm. The excess heat generated from the data center is reused by Fortum Varme, an energy company, by distributing it to customers (2,500 modern residential apartments at full load) throughout the city.
- The UK recorded the highest number of data centers across Europe. Market players can target these countries to invest in their new technologies. Also, they can form partnerships with upcoming data center organizations to cater to their requirements at a competitive price, which may aid the growth of the European data center cooling market over the forecast period.

- Green and renewable solutions, such as green electricity, water reclamation, zero water cooling systems, recycling, and waste management, are being used to build the most sustainable data centers. Growth in Big Data volume across European countries, including the United Kingdom, is expected to increase the need for low-latency and high-capacity data centers, thereby boosting cooling system utilization. According to Science Direct, data center energy use might account for 2.13% of worldwide electricity supply over the forecast period.
- Companies are regularly trying to reduce their operational cost across their verticals, increasing the AI technology used in data center cooling systems in the country. For instance, Siemens introduced AI-based thermal optimization, wherein the company utilizes Vigilant AI products to enhance cooling systems in data centers.

Europe Data Center Cooling Industry Overview

The European data center cooling market is fragmented as the benefits offered by the technology and support from the government by imposing efficiency regulations on data centers are expected to help the growth of the data center cooling market. Some major market players are IBM Corporation, Fujitsu Ltd, Hitachi Ltd, Hewlett-Packard Enterprise, and Schneider Electric SE. Market penetration is growing with a strong presence of major players in established markets. With the increasing focus on innovation, the demand for new technologies is growing, which, in turn, is driving investments for further developments.

- May 2024: Rittal, in collaboration with multiple hyperscale data center operators, developed a modular cooling system. This solution boasts a cooling capacity exceeding 1 MW, achieved through direct water cooling. It is specifically tailored to cater to the high-power densities of AI applications.
- January 2024: Aligned Data Centers, the technology infrastructure company providing sustainable, innovative, and adaptive scale data centers and build-to-scale solutions for global hyperscale and enterprise customers, introduced its DeltaFlow liquid cooling technology, a patent-pending solution built to support the high-density compute requirements of next-generation applications and high-performance computing, including artificial intelligence, machine learning, and supercomputers. DeltaFlow extended Aligned's ExpandOnDemand capabilities, providing customers the flexibility to seamlessly scale and pivot to support shifting computing environments.

Additional Benefits:

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

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