

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

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

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Report description:

The MEA Data Center Cooling Market is expected to register a CAGR of 9.6% during the forecast period.

Key Highlights

- The market in the region is driven by a consistent storm of government and enterprise, developing a digital infrastructure to support automation adoption across a variety of end-user verticals, including financial services, telecommunications retail, and manufacturing.
- Many major cloud players are entering the region to grab the opportunity of this untapped market. Hence this will also develop the demand for data center cooling. Additionally, the regional weather also makes cooling solutions a priority for data centers.
- Africa is emerging as a potential market for data centers. Africa Data Centers, a subsidiary of Liquid Telecom, has fitted out another floor for adding enough space for another 160 racks in its facility in Nairobi, Kenya. The newly-opened floor is a direct response to the massive demand for colocation and hosting services in Africa.
- The dual effects of COVID-19 and sharp oil price reduction have had manifold economic consequences across the Gulf region. Despite the downturn, one sector of the economy, namely internet service providers (ISPs), information technology (IT) infrastructure providers, and data centers, has seen demand increase primarily as a result of the shift towards home and remote working. This indicates the rising demand for the Data center cooling market in the region.

MEA Data Center Cooling Market Trends

Healthcare to Show Significant Growth

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- Digitization of consumer health records in the form of electronic medical records (EMR) contributes to data increment. The latest innovations in the medical equipment and modernization of legacy operating systems, such as management of personnel, improvement in the patient response systems, etc., generate a multitude of data, further necessitating the need for data centers. This need for data centers, in turn, drives the demand for data center cooling.
- With digitization creating the most significant impact, investment in healthcare technology has been considered as a key priority. According to a report published by Omnia Health Insights in June 2020, telemedicine was also identified as a crucial development for clinics and medical practices, particularly those with a turnover of USD 5-10 million, and more so in the GCC and the Middle East than other regions.
- For instance, in July 2020, TVM Capital Healthcare raised a second growth capital fund focused on investment in the Gulf. The new fund will have a strong focus on the GCC, but also Saudi Arabia specifically. For its new Gulf-focused fund, the company will look to invest in all areas of health care, except for general hospitals. This has further increased the generation of data records of patients, and in turn, increased the demand for data center cooling technologies in the region.

Saudi Arabia to Hold the Highest Market Share

- Saudi Arabia has recently become one of the technology hubs of the Middle East and Africa region. With major IT and Healthcare firms gaining access to the market, there has been a steep increase in demand for data centers in the region such that the companies can keep their data within the boundaries of the country.
- Further, Saudi Arabia's Vision 2030 objectives have led to the technology giants, like Google, Microsoft, and IBM, setting up data centers in the country, with plans to extend the facilities as well.
- Currently, six areas of the country offer 22 colocation data centers for several private and public enterprises across the globe. Further, in January 2021, BIOS Middle East, a leading provider of cloud and managed IT services in the Middle East, announced it has established two new cloud footprints in Riyadh and Jeddah to serve customers in the Kingdom of Saudi Arabia. Such instances are expected to increase the demand for data center cooling solutions in the country.

MEA Data Center Cooling Industry Overview

The Middle East and Africa Data Center cooling market is moderately fragmented and consists of several players. In terms of market share, few of the major players currently dominate the market. However, with innovative and sustainable packaging, many of the companies are increasing their market presence by securing new contracts and by tapping new markets.

- May 2021 - Global technology company SAP has announced its partnership with The National Central Cooling Company PJSC (Tabreed), the leading UAE-based international district cooling developer, in a move that will contribute to the digital transformation of the district cooling industry.

Additional Benefits:

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

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