

Global Data Center Cooling Market Landscape 2025-2030

Market Report | 2025-06-03 | 386 pages | Arizton Advisory & Intelligence

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Report description:

The global data center cooling market size by investment is expected to grow at a CAGR of 16.46% from 2024 to 2030.

DATA CENTER COOLING MARKET TRENDS

A Surge in Adoption of AI Will Drive Demand for Advanced Cooling Technologies

- The global data center cooling market is witnessing significant growth, driven by the adoption of advanced technologies such as AI and ML. The organizations are increasingly embracing AI for various purposes.
- In February 2025, Vertiv introduced its global Liquid Cooling Services portfolio, aimed at supporting AI and high-density computing to provide end-to-end solutions such as integration, deployment, installation, and maintenance of liquid cooling systems.
- The significant adoption of AI is transforming various industries, offering enhanced efficiency and functionality in areas like finance and healthcare. To support the demands of AI and ML workloads, data centers increasingly rely on liquid-based cooling systems, which effectively manage the substantial heat produced by high-performance hardware like TPUs.

Growing Rack Power Density

- Rack power density plays a vital role in data center design, influencing capacity planning, cooling strategies, and power distribution. In recent years, there has been a significant increase in the power density of IT equipment racks, driven by the growing adoption of AI, ML, IoT, and the rise of cryptocurrency mining. These applications demand greater data processing and storage capabilities, demanding the need for high-density rack solutions.
- The growing need for high-performance computing (HPC), driven by the adoption of converged and hyper-converged infrastructure along with virtualization technologies, will contribute to an average rack power density of over 30 kW and more during the forecast period. The hyperscale data centers with power capacities of over 15 MW are projected to experience substantial expansion in their rack power densities.

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- The increasing rack power density has made the use of innovative and flexible facility designs imperative, along with the adoption of rack-level UPS solutions and diverse electricity feeds for racks. Currently, many large and mega data centers are being equipped with power infrastructure that can support a rack density of up to 50 kW.
- In March 2025, Nvidia announced plans to introduce the Rubin Ultra NVL576 rack by 2027, designed with liquid cooling technology, capable of delivering over 15 exaflops of FP4 inference performance, and this rack is expected to consume a power capacity of over 600 KW.

Innovations in Data Center Cooling Techniques

- Immersion cooling is a type of liquid-based technology that controls the temperature of data center equipment by fully submerging components like CPUs in a thermally conductive fluid. This approach effectively removes heat and maintains optimal performance, offering greater efficiency than traditional air-based systems like CRAC units, due to the superior thermal conductivity of liquids over air.
- According to the Uptime Institute, improving data center cooling plays a key role in boosting colocation sustainability. Implementing direct-to-chip liquid cooling allows data centers to efficiently handle high-density, high-performance server clusters while also reducing both energy and water usage.
- In March 2025, CoolIT Systems launched a prototype single-phase liquid cooling cold plate capable of handling approximately 4,000 watts, which can cool chips three times more powerfully than current-gen Nvidia GPUs.
- In October 2024, Hewlett-Packard Enterprise inaugurated a fanless direct liquid cooling system aimed at enhancing energy and cost efficiency for AI workloads. This cooling system is estimated to reduce cooling power consumption by around 37% per server blade.
- In March 2024, Nautilus Data Technologies launched its EcoCore modular data center offering with an IT capacity of over 2.5MW, featuring integrated CDU units and support for both traditional and advanced liquid cooling systems.

Adoption of Liquid-Cooling Techniques

- In January 2025, Bit Digital announced plans to enhance its MTL2 facility in Canada by implementing direct-to-chip liquid cooling technology to accommodate AI and other high-performance computing workloads.
- In December 2024, Schneider Electric and Nvidia collaborated to develop a liquid-cooled architecture for Nvidia's GB200 NVL72 chips, capable of supporting rack densities exceeding 132 kW, aiming to boost energy efficiency and promote sustainability in data centers.
- In October 2024, Flex collaborated with JetCool to expand its liquid cooling offerings, introducing new reference designs for liquid-cooled servers, racks, and power solutions during the OCP event in California.

DATA CENTER COOLING MARKET SEGMENTATION INSIGHTS

- The global data center cooling market is evolving rapidly with innovative technologies aimed at improving energy efficiency and minimizing environmental impact. The implementation of waterside economizers and various evaporative cooling systems is increasing significantly, particularly in regions with colder climates.
- As the need for sustainable and reliable data storage and processing rises, the global data center cooling market is anticipated to witness further growth driven by the increasing adoption of advanced cooling technologies.
- Countries such as the U.S., Germany, the UK, and France, along with various countries worldwide that host supercomputing facilities and have rack power densities above 100 kW, have become major adopters of direct-liquid cooling and liquid immersion technologies.
- Free cooling has also become a widely adopted method, especially in areas like Western Europe, the Nordics, APAC, North America, and other regions, where favorable ambient temperatures allow data centers to use outside air for cooling year-round, reducing the reliance on traditional chillers.

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-□The data center cooling market is experiencing ongoing innovations in free cooling, including developing free cooling chillers that operate without water and indoor CRAC units that optimize cooling efficiency. For instance, the AM2 facility in Amsterdam, Netherlands, is equipped with water-cooled chillers with N+1 configuration redundancy by Equinix.

Segmentation by Infrastructure

-□Cooling Systems

-□Other Mechanical Infrastructure

Segmentation by Cooling Systems

-□CRAC & CRAH Units

-□Chiller Units

-□Cooling Towers, Condensers, & Dry Coolers

-□Other Cooling Units

Segmentation by Cooling Technique

-□Air-Based Cooling Techniques

-□Liquid-Based Cooling Techniques

Segmentation by Liquid-based Cooling Techniques

-□Water-based Cooling

-□Direct-to-chip Cooling

-□Liquid Immersion Cooling

Segmentation by Tier Standards

-□Tier I & II

-□Tier III

-□Tier IV

GEOGRAPHICAL ANALYSIS

-□In the global data center cooling market, North America dominated the market in terms of investment, with a market share of around 53% in 2024, followed by APAC and Europe (Western Europe, Nordics, and Central & Eastern Europe).

-□The North American data center cooling market is expected to witness significant growth in terms of investment, with a growth rate of around 143% between 2024 to 2030. In North America, the U.S. witnessed the highest investment, around a 98% share in 2024, followed by Canada.

-□In the Latin American data center cooling market, Brazil witnessed the highest industry share in 2024, followed by Mexico, Chile, Colombia, and the rest of Latin America.

-□In Europe, Germany dominated the data center cooling market with an industry share of around 20% in 2024, followed by the UK, France, Norway, Ireland, Sweden, Spain, Russia, Italy, Netherlands, Finland & Iceland, Switzerland, Denmark, Belgium, Poland, and other European countries.

-□In the Middle East and Africa, South Africa dominated the data center cooling market share in 2024, and Saudi Arabia, UAE, Israel, Nigeria, Kenya, Egypt, and other countries followed it.

-□APAC was the second-largest data center cooling market by investment globally in 2024. China was the largest market in APAC, followed by Australia, Japan, India, South Korea, Hong Kong, Taiwan, New Zealand, and the rest of the APAC countries.

-□North America

-□The U.S.

-□Canada

-□Latin America

-□Brazil

-□Mexico

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- []Chile
- []Colombia
- []Rest of Latin America
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- []The U.K.
- []Germany
- []France
- []Netherlands
- []Ireland
- []Italy
- []Switzerland
- []Spain
- []Belgium
- []Other Western European Countries
- []Nordic
- []Denmark
- []Sweden
- []Norway
- []Finland & Iceland
- []Central and Eastern Europe
- []Russia
- []Poland
- []Other Central & Eastern European Countries
- []Middle East
- []UAE
- []Saudi Arabia
- []Israel
- []Other Middle Eastern Countries
- []Africa
- []South Africa
- []Kenya
- []Nigeria
- []Egypt
- []Other African Countries
- []APAC
- []China
- []Hong Kong
- []Australia
- []New Zealand
- []India
- []Japan
- []Taiwan
- []South Korea
- []Rest of APAC
- []Southeast Asia
- []Singapore
- []Indonesia

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- []Malaysia
- []Thailand
- []Philippines
- []Vietnam
- []Other Southeast Asian Countries

DATA CENTER COOLING MARKET VENDOR LANDSCAPE

- []The global data center cooling market hosts numerous active vendors offering a wide range of solutions. Vendors that deliver innovative and advanced technologies are more likely to secure a larger market share throughout the forecast period.
- []Some of the prominent cooling infrastructure providers operating in the global data center cooling market include 4energy, 3M, Asetek, Black Box, Carrier, Condair, Daikin Applied, Delta Electronics, Johnson Controls, Mitsubishi Electric, STULZ, Schneider Electric, Rittal, Vertiv, and others.
- []Numerous colocation providers in the global data center cooling market are embracing advanced cooling technologies in their facilities. This new technology involves submerging computer servers in a special liquid that helps keep them cool. As a result, vendors offering these advanced cooling solutions are likely to see growth in their revenue share within the industry. In October 2024, Submer invested over USD 6.55 billion to expand its sustainable immersion cooling solutions.
- []In July 2024, PeaSoup partnered with Midas Immersion Cooling, Centersquare, and Castrol to implement energy-efficient HPC cloud solutions utilizing immersion cooling and high-performance liquid coolants.
- []In June 2024, Asperitas introduced its Direct Forced Convection immersion cooling technology, featuring a 12U tank that provides more than 3.6kW per U and over 2000W per socket.

Cooling Infrastructure Providers

- []3M
- []4Energy
- []AAON
- []Airedale
- []AIRSYS
- []Alfa Laval
- []Aqua Cooling
- []Aquila Capital
- []Asetek
- []Asperitas
- []Austin Hughes Electronics
- []Canovate Group
- []Carrier
- []Chilldyne
- []CITEC International
- []ClimateWorx International
- []Condair Group
- []Cooler Master
- []CoolIT Systems
- []Daikin Applied
- []DCX LIQUID COOLING SYSTEMS
- []Degree Controls
- []Delta Electronics

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- []ebm-papst
- []EMICON
- []Envicool
- []FlaktGroup
- []Fuji Electric
- []GIGABYTE
- []Green Revolution Cooling (GRC)
- []HiRef S.p.A.
- []Huawei Technologies
- []Iceotope
- []Johnson Controls
- []Kelvion
- []KyotoCooling
- []Legrand
- []Lennox International
- []LiquidCool Solutions
- []LiquidStack
- []Midas Immersion Cooling
- []Motivair by Schneider Electric
- []Munters
- []Nortek Air Solutions
- []nVent
- []OceanAire
- []Renovo Zhuhai
- []Rittal
- []Schneider Electric
- []Shanghai Shenglin M&E Technology
- []SPX Cooling Tech
- []Stellar Energy
- []STULZ
- []Submer
- []Swegon
- []SWEP
- []Systecon
- []Systemair Group
- []Trane
- []United Metal Products
- []Vertiv
- []Vigilant
- []Wakefield Thermal
- []Baltimore Aircoil Company
- []Evapco
- []Castrol
- []Guntner
- []The Lubrizol Corporation
- []Belimo
- []Aggreko

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- Mikros Technologies
- Vaisala
- Dow
- Danfoss Climate Solutions
- Zutacore
- Boyd
- Flex

KEY QUESTIONS ANSWERED:

1. How big is the global data center cooling market?
2. What is the growth rate of the global data center cooling market?
3. What are the key trends in the global data center cooling market?

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