

Global Data Center Cooling Market Landscape 2025-2030

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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 Al 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 Al and ML. The organizations are increasingly embracing Al 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.

- 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.

- 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

-[]Chile

Colombia
Rest of Latin America

- Western Europe

-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
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- -[]UAE
- -□Saudi Arabia
- -[]Israel
- Other Middle Eastern Countries
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- South Africa
- -[]Kenya
- -[]Nigeria
- -[]Egypt
- Other African Countries
- -[]APAC
- -[]China
- -[]Hong Kong
- -[]Australia
- -New Zealand
- -[]India
- -[]]apan
- -[]Taiwan
- -[]South Korea
- -[Rest of APAC
- Southeast Asia
- -[]Singapore
- -[]Indonesia

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

-[]ebm-papst - EMICON -[]Envicool -[]FlaktGroup - Fuji Electric - GIGABYTE - Green Revolution Cooling (GRC) - HiRef S.p.A. - Huawei Technologies -[]lceotope - 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 -[]Vigilent - Wakefield Thermal - Baltimore Aircoil Company - Evapco -∏Castrol -[]Guntner - The Lubrizol Corporation -[]Belimo -[]Aggreko

- 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?

Table of Contents:

1. □ ABOUT ARIZTON □ 2. ABOUT OUR DATA CENTER CAPABILITIES 3. WHAT'S INCLUDED 4. SEGMENTS INCLUDED 5. RESEARCH METHODOLOGY 6. MARKET AT GLANCE 7. PREMIUM INSIGHTS 8. IMPACT OF TARRIFF ON GLOBAL DATA CENTER COOLING MARKET 9. INVESTMENT OPPORTUNITIES 9.1. INVESTMENT: MARKET SIZE & FORECAST 10. MARKET DYNAMICS 10.1. MARKET OPPORTUNITIES & TRENDS 10.2. MARKET GROWTH ENABLERS 10.3. MARKET RESTRAINTS 11.□MARKET SEGMENTATION□ 11.1.∏INFRASTRUCTURE □ 11.2. □COOLING SYSTEMS □ 11.3. COOLING TECHNIQUE 11.4. □LIQUID BASED COOLING TECHNIQUE 11.5. TIER STANDARDS 12. GEOGRAPHY SEGMENTATION 13. NORTH AMERICA 13.1. MARKET SNAPSHOT & KEY HIGHLIGHTS 13.2. DATA CENTER COOLING MARKET BY INVESTMENT 13.3. DATA CENTER COOLING MARKET BY INFRASTRUCTURE 14. []US[] 14.1. [INVESTMENT] 14.2. MARKET BY INVESTMENT□ 14.3. MARKET BY INFRASTRUCTURE □ 14.4. LIST OF UPCOMING DATA CENTER PROJECTS IN U.S. 15. CANADA 15.1. INVESTMENT

15.2. MARKET BY INVESTMENT 15.3. MARKET BY INFRASTRUCTURE 15.4. LIST OF UPCOMING DATA CENTER PROJECTS IN CANADA 16. LATIN AMERICA 16.1. MARKET SNAPSHOT & KEY HIGHLIGHTS 16.2. MARKET BY INVESTMENT 16.3. MARKET BY INFRASTRUCTURE 16.4. LIST OF UPCOMING DATA CENTER PROJECTS IN LATIN AMERICA 17.∏BRAZIL∏ 17.1.⊓INVESTMENT⊓ 17.2. □ MARKET BY INVESTMENT □ 17.3. MARKET BY INFRASTRUCTURE □ 18.⊓MEXICO⊓ 18.1. INVESTMENT 18.2. MARKET BY INVESTMENT 18.3. MARKET BY INFRASTRUCTURE □ 19. CHILE 19.1. INVESTMENT 19.2. MARKET BY INVESTMENT 19.3. MARKET BY INFRASTRUCTURE □ 20. COLOMBIA 20.1. [INVESTMENT] 20.2. MARKET BY INVESTMENT 20.3. MARKET BY INFRASTRUCTURE 21. REST OF LATIN AMERICA 21.1. INVESTMENT 21.2. MARKET BY INVESTMENT 21.3. MARKET BY INFRASTRUCTURE 22. WESTERN EUROPE 22.1. ∏MARKET SNAPSHOT & KEY HIGHLIGHTS ∏ 22.2. DATA CENTER COOLING MARKET BY INVESTMENT 22.3. DATA CENTER COOLING MARKET BY INFRASTRUCTURE 23. ПUKП 23.1.□INVESTMENT□ 23.2. MARKET BY INVESTMENT 23.3. MARKET BY INFRASTRUCTURE 23.4. LIST OF UPCOMING DATA CENTER PROJECTS IN U.K. 24. GERMANY 24.1. [INVESTMENT] 24.2. MARKET BY INVESTMENT 24.3. MARKET BY INFRASTRUCTURE 24.4. LIST OF UPCOMING DATA CENTER PROJECTS IN GERMANY 25.∏FRANCE∏ 25.1.□INVESTMENT□ 25.2. MARKET BY INVESTMENT 25.3. MARKET BY INFRASTRUCTURE 25.4. LIST OF UPCOMING DATA CENTER PROJECTS IN FRANCE

26. NETHERLANDS 26.1. INVESTMENT 26.2. MARKET BY INVESTMENT 26.3. MARKET BY INFRASTRUCTURE 26.4. LIST OF UPCOMING DATA CENTER PROJECTS IN NETHERLANDS 27.⊓IRELAND⊓ 27.1. INVESTMENT 27.2. MARKET BY INVESTMENT □ 27.3. MARKET BY INFRASTRUCTURE 27.4.□LIST OF UPCOMING DATA CENTER PROJECTS IN IRELAND□ 28. □SWITZERLAND □ 28.1. □INVESTMENT□ 28.2. □ MARKET BY INVESTMENT □ 28.3. MARKET BY INFRASTRUCTURE □ 28.4. LIST OF UPCOMING DATA CENTER PROJECTS IN SWITZERLAND 29. ITALY 29.1. INVESTMENT 29.2. MARKET BY INVESTMENT 29.3. MARKET BY INFRASTRUCTURE 29.4. TLIST OF UPCOMING DATA CENTER PROJECTS IN ITALY 30.∏SPAIN∏ 30.1. [INVESTMENT] 30.2. MARKET BY INVESTMENT 30.3. MARKET BY INFRASTRUCTURE 30.4. LIST OF UPCOMING DATA CENTER PROJECTS IN SPAIN 31. BELGIUM 31.1. INVESTMENT 31.2. MARKET BY INVESTMENT 31.3. MARKET BY INFRASTRUCTURE 31.4. □LIST OF UPCOMING DATA CENTER PROJECTS IN BELGIUM 32. □OTHER WESTERN EUROPEAN COUNTRIES □ 32.1. □INVESTMENT□ 32.2. ΠMARKET BY INVESTMENT Π 32.3. MARKET BY INFRASTRUCTURE □ 32.4. LIST OF UPCOMING DATA CENTER PROJECTS IN OTHER WESTERN EUROPE COUNTRIES 33. NORDICS 33.1. MARKET SNAPSHOT & KEY HIGHLIGHTS 33.2. DATA CENTER COOLING MARKET BY INVESTMENT 33.3. DATA CENTER COOLING MARKET BY INFRASTRUCTURE 33.4. □LIST OF UPCOMING DATA CENTER PROJECTS IN NORDICS 34.∏SWEDEN∏ 34.1. [INVESTMENT] 34.2. MARKET BY INVESTMENT 34.3. ΠMARKET BY INFRASTRUCTURE □ 35. DENMARK 35.1.□INVESTMENT□ 35.2. MARKET BY INVESTMENT

35.3. MARKET BY INFRASTRUCTURE 36. ∏NORWAY ∏ 36.1. INVESTMENT 36.2. MARKET BY INVESTMENT 36.3. MARKET BY INFRASTRUCTURE 37. □FINLAND & ICELAND □ 37.1.□INVESTMENT□ 37.2. MARKET BY INVESTMENT □ 37.3. MARKET BY INFRASTRUCTURE 38. CENTRAL & EASTERN EUROPE 38.1. ∏MARKET SNAPSHOT & KEY HIGHLIGHTS∏ 38.2. DATA CENTER COOLING MARKET BY INVESTMENT 38.3. □ DATA CENTER COOLING MARKET BY INFRASTRUCTURE □ 38.4.□LIST OF UPCOMING DATA CENTER PROJECTS IN CENTRAL & EASTERN EUROPE□ 39. RUSSIA 39.1.□INVESTMENT□ 39.2. MARKET BY INVESTMENT 39.3. MARKET BY INFRASTRUCTURE 40. POLAND 40.1.□INVESTMENT□ 40.2. MARKET BY INVESTMENT 40.3. MARKET BY INFRASTRUCTURE 41. OTHER CENTRAL & EASTERN EUROPEAN COUNTRIES 41.1.□INVESTMENT□ 41.2. MARKET BY INVESTMENT 41.3. MARKET BY INFRASTRUCTURE 42.⊓MIDDLE EAST⊓ 42.1. MARKET SNAPSHOT & KEY HIGHLIGHTS 42.2. DATA CENTER COOLING MARKET BY INVESTMENT 42.3. DATA CENTER COOLING MARKET BY INFRASTRUCTURE 42.4.⊓LIST OF UPCOMING DATA CENTER PROJECTS IN MIDDLE EAST∏ 43.∏UAE∏ 43.1. □INVESTMENT□ 43.2. □MARKET BY INVESTMENT □ 43.3. MARKET BY INFRASTRUCTURE 44. SAUDI ARABIA 44.1.⊓INVESTMENT⊓ 44.2. MARKET BY INVESTMENT 44.3. MARKET BY INFRASTRUCTURE 45.⊓ISRAEL⊓ 45.1. □INVESTMENT□ 45.2. MARKET BY INVESTMENT 45.3. ∏MARKET BY INFRASTRUCTURE ∏ 46. □ OTHER MIDDLE EASTERN COUNTRIES □ 46.1. INVESTMENT 46.2. MARKET BY INVESTMENT 46.3. MARKET BY INFRASTRUCTURE

47. AFRICA 47.1. MARKET SNAPSHOT & KEY HIGHLIGHTS 47.2. DATA CENTER COOLING MARKET BY INVESTMENT 47.3. DATA CENTER COOLING MARKET BY INFRASTRUCTURE 47.4. LIST OF UPCOMING DATA CENTER PROJECTS IN AFRICA 48. SOUTH AFRICA □ 48.1. INVESTMENT 48.2. MARKET BY INVESTMENT [] 48.3. MARKET BY INFRASTRUCTURE 49. ⊓KENYA ∏ 49.1.⊓INVESTMENT⊓ 49.2. ΠMARKET BY INVESTMENT Π 49.3. MARKET BY INFRASTRUCTURE □ 50. NIGERIA 50.1. INVESTMENT 50.2. MARKET BY INVESTMENT 50.3. MARKET BY INFRASTRUCTURE 51.[[EGYPT[] 51.1. [INVESTMENT] 51.2. ΠMARKET BY INVESTMENT Π 51.3. MARKET BY INFRASTRUCTURE 52. OTHER AFRICAN COUNTRIES 52.1. □INVESTMENT□ 52.2. MARKET BY INVESTMENT 52.3. MARKET BY INFRASTRUCTURE 53. [] APAC [] 53.1. MARKET SNAPSHOT & KEY HIGHLIGHTS 53.2. DATA CENTER COOLING MARKET BY INVESTMENT 53.3. DATA CENTER COOLING MARKET BY INFRASTRUCTURE 54. ⊓CHINA П 54.1. □INVESTMENT□ 54.2. □MARKET BY INVESTMENT □ 54.3. MARKET BY INFRASTRUCTURE □ 54.4. ILIST OF UPCOMING DATA CENTER PROJECTS IN CHINA 55. HONG KONG 55.1. INVESTMENT 55.2. MARKET BY INVESTMENT 55.3. MARKET BY INFRASTRUCTURE 55.4. LIST OF UPCOMING DATA CENTER PROJECTS IN HONG KONG 56. AUSTRALIA 56.1. [INVESTMENT] 56.2. MARKET BY INVESTMENT 56.3. MARKET BY INFRASTRUCTURE □ 56.4. LIST OF UPCOMING DATA CENTER PROJECTS IN AUSTRALIA 57. NEW ZEALAND 57.1. INVESTMENT

57.2. MARKET BY INVESTMENT

57.3. MARKET BY INFRASTRUCTURE 57.4. LIST OF UPCOMING DATA CENTER PROJECTS IN NEW ZEALAND 58. JAPAN 58.1. INVESTMENT 58.2. MARKET BY INVESTMENT 58.3. ∏MARKET BY INFRASTRUCTURE □ 58.4. LIST OF UPCOMING DATA CENTER PROJECTS IN JAPAN 59. INDIA 59.1. [INVESTMENT] 59.2. ΠMARKET BY INVESTMENT Π 59.3. MARKET BY INFRASTRUCTURE □ 59.4. ILIST OF UPCOMING DATA CENTER PROJECTS IN INDIA 60. SOUTH KOREA □ 60.1. INVESTMENT 60.2. MARKET BY INVESTMENT 60.3. ΠMARKET BY INFRASTRUCTURE □ 60.4. LIST OF UPCOMING DATA CENTER PROJECTS IN SOUTH KOREA 61. TAIWAN 61.1. [INVESTMENT] 61.2. ΠMARKET BY INVESTMENT Π 61.3. MARKET BY INFRASTRUCTURE 61.4. LIST OF UPCOMING DATA CENTER PROJECTS IN TAIWAN 62. □ REST OF APAC □ 62.1. INVESTMENT 62.2. MARKET BY INVESTMENT 62.3. MARKET BY INFRASTRUCTURE 63. □SOUTHEAST ASIA □ 63.1. MARKET SNAPSHOT & KEY HIGHLIGHTS 63.2. DATA CENTER COOLING MARKET BY INVESTMENT 63.3. DATA CENTER COOLING MARKET BY INFRASTRUCTURE 64.∏SINGAPORE ∏ 64.1.⊓INVESTMENT⊓ 64.2. □ MARKET BY INVESTMENT □ 64.4.□LIST OF UPCOMING DATA CENTER PROJECTS IN SINGAPORE□ 65. INDONESIA 65.1.⊓INVESTMENT⊓ 65.2. MARKET BY INVESTMENT 65.3. MARKET BY INFRASTRUCTURE 65.4. LIST OF UPCOMING DATA CENTER PROJECTS IN INDONESIA 66. MALAYSIA 66.1. [INVESTMENT] 66.2.□MARKET BY INVESTMENT □ 66.3. ∏MARKET BY INFRASTRUCTURE ∏ 66.4. LIST OF UPCOMING DATA CENTER PROJECTS IN MALAYSIA 67. THAILAND 67.1. INVESTMENT

67.2. MARKET BY INVESTMENT 67.3. MARKET BY INFRASTRUCTURE 67.4. LIST OF UPCOMING DATA CENTER PROJECTS IN THAILAND 68. PHILIPPINES 68.1. [INVESTMENT] 68.2. MARKET BY INVESTMENT 68.3. MARKET BY INFRASTRUCTURE 68.4. LIST OF UPCOMING DATA CENTER PROJECTS IN PHILIPPINES 69. VIETNAM 69.1.□INVESTMENT□ 69.2. MARKET BY INVESTMENT 69.3. MARKET BY INFRASTRUCTURE 69.4.□LIST OF UPCOMING DATA CENTER PROJECTS IN VIETNAM□ 70. OTHER SOUTHEAST ASIAN COUNTRIES 70.1. [INVESTMENT] 70.2. MARKET BY INVESTMENT 70.3. MARKET BY INFRASTRUCTURE 70.4. MARKET PARTICIPANTS 70.5. COOLING INFRASTRUCTURE PROVIDERS 71. QUANTITATIVE SUMMARY 72. APPENDIX 72.1. ABBREVIATIONS 72.2. □ DEFINITIONS □ 72.3. SEGMENTAL COVERAGE



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