

# Global Data Center Cooling Market is Projected to Reach Revenues of \$8 billion by 2023 | Arizton

*Economizers and evaporative coolers are the fastest growing segment in the global market at a CAGR of more than 7% during 2017-2023*

CHICAGO, IL, UNITED STATES, August 1, 2018 /EINPresswire.com/ -- Arizton's recent market research report on the [global data center cooling market](#) provides comprehensive industry analysis, trend forecasts, and competitive analysis. The research study segments the market by cooling infrastructure (cooling system and other infrastructure), by cooling technique (air-based cooling and liquid-based cooling), by cooling systems (CRAC & CARH, chiller, cooling towers & dry coolers, economizers & evaporative coolers, and other cooling units), geography (America, EMEA, and APAC), and offers detailed competitive analysis.

The global data center cooling market is expected to generate revenues of around \$8 billion by 2023, growing at a CAGR of approximately 6% during 2017-2023.

Data Center Cooling Market - Overview



North America to contribute around 40% of the revenues in the global data center cooling market during the forecast period"

*Harry, Consultant*

The growing demand for facilities development and increasing need to improve energy efficiency through a reduction in power consumption and carbon footprint is leading to the growth of the data center cooling market. The emergence of edge computing that is fostering the development of secondary datacenter markets through the adoption of modular facilities is driving the demand for cooling solutions in the global market. Hyperscale operators are focusing on the procurement of 100%

renewable energy to promote sustainable development of the facility in the global market with the incorporation of energy efficient infrastructure. Regions such as the US, Canada, and Nordic are facilitating both free cooling and cheaper electricity rate to reduce power costs in the market. The adoption of energy efficient cooling infrastructure solutions helps reduce the electricity cost



and enable facility operations at a PUE of less than 1.3 in the global market. Furthermore, the increased procurement of free cooling chillers, evaporative, and economization-based cooling units will transform the global market. Hyperscale construction vendors such as Apple, Facebook, Google, AWS, Microsoft, Alibaba, Baidu, OVH, and China Telecom are investing billion dollars in the development of new facilities in the market. The increase in rack power density of up to 40 kW will boost the demand for efficient infrastructure in the market. The innovations that aim to enhance the operational efficiency of the facilities, reduce power consumption, and decrease carbon emissions will help generate revenues in the global data center cooling market.

The adoption of innovative and energy efficient cooling infrastructure solutions helps to reduce the power consumption by up to 50% and operating expenditure of the facility in the global market. The increasing number of research and development projects on tropical climate datacenters and under water datacenters is expected to gain prominence in the market over the next few year.

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The top 3 drivers and trends augmenting the growth of the global data center cooling market are discussed below:

Increasing Construction of Green Data Center Facilities

The growing need to reduce the environmental impact of facilities is one of the primary considerations for operators and enabling the launch of innovative power and cooling solutions in the global data center cooling market. The operators are implementing the use of efficient IT and cooling infrastructures that will help reduce the OPEX and CAPEX considerably across facilities in the market. Modern facilities are being built with PUE of around 1.1–1.3, with flexibility in design and adoption of DCIM solutions to help operators attract new consumers in the global market. The use of free cooling systems across the US, Canada, and Europe which requires lesser energy than traditional solutions will lead to the evolution of the global data center cooling market. The use of free cooling solutions in facilities will help reduce energy consumption by up to 50% in terms of cooling OPEX in the market. Modern cooling systems are

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**KEY TRENDS**

- District Heating by Data Centers
- Growth in Construction of Cryptocurrency Data Centers
- Increased Adoption of Automation and Monitoring Solutions
- Favorable Locations for Data Center Construction and Cooling
- Growing Rack Power Density
- Data Center Innovations Targeting Cooling

**GLOBAL DATA CENTER COOLING MARKET**

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source: Global Data Center Cooling Market Report by Arizton

**Trends and Drivers of Global Data Center Cooling Market 2023**

**Global Data Center Cooling Market**

- BY COOLING INFRASTRUCTURE**
  - Cooling System
  - Other Infrastructure
- BY COOLING TECHNIQUE**
  - Air-based Cooling
  - Liquid-based Cooling
- BY LIQUID COOLING TECHNIQUE**
  - Water-based Cooling Technique
  - Direct Liquid and Liquid Immersion Cooling Technique
- BY COOLING SYSTEMS**
  - CRAC & CARH
  - Chiller
  - Cooling Towers & Dry Coolers
  - Economizers & Evaporative Coolers
  - Other Cooling Units
- BY GEOGRAPHY**
  - Americas
    - US
    - Canada
    - Latin America
  - EMEA
    - Western Europe
    - Nordic
    - Eastern Europe
    - Middle East & Africa
  - APAC
    - China & Hong Kong
    - Singapore
    - Australia
    - Rest of APAC

**Top Segments of Global Data Center Cooling Market 2023**

adopted with in-built monitoring control or wireless monitoring of the systems through DCIM. Such efforts in promoting and implementation of energy-efficient green datacenter operations will augment the growth of the global data center cooling market. The introduction of artificial intelligence and innovative equipment will contribute to revenues in the global market.

### Data Center Innovations Targeting Cooling

The increasing investment in developing innovative cooling systems will result in the evolution of the global data center cooling market. The two major innovations in the market consist of tropical climate datacenter and underwater datacenter. These projects are expected to reduce energy consumption significantly and have the potential to change the landscape of cooling solutions across countries that experience tropical climates. The leading vendors are developing facilities in tropical climates for regions such as India, Southeast Asia, Malaysia, Australia, and MEA with these innovations to gain a larger global data center cooling market share. For instance, in November 2015, Microsoft deployed its first underwater container datacenter (Project Natick), which is approximately one kilometer off the Pacific coast of the US. In June 2018, after the success of Phase 1, Microsoft has deployed Phase 2 of its Project Natick, full-scale undersea datacenter modules and dropped it European Marine Energy Centre in June of 2018. These projected are expected to revolutionize the global data center cooling market during the forecast period.

### Increased Adoption of Automation and Monitoring Solutions

The increasing power consumption and energy wastage are urging top operators to implement automation and monitoring solutions in the global data center cooling market. The adoption of end-to-end monitoring of facilities will help companies identify the maintenance requirements of infrastructure to avoid operational failures in the market. The top players are offering modern infrastructure with controls for direct and remote monitoring features to boost their revenues in the global data center cooling market. The implementation of DCIM solutions will help tackle situations such as high power consumption, increased carbon emissions, and inefficiency of traditional cooling systems in the global market. Companies such as Schneider Electric's StruxureWare, Siemens Datacenter Clarity LC, Nylte Software, Sunbird (dcTrack), Vertiv's Trellis, and ABB's Ability are offering innovative solutions in the global data center cooling market.

### [Read the report details.](#)

The data center cooling market is divided into five major segments that consist of cooling infrastructure, cooling technique, liquid cooling technique, cooling systems, and geography.

Economizers and evaporative coolers to grow at the fastest CAGR in the data center cooling market during the forecast period

The data center cooling market by cooling systems is segmented into CRAC & CARH, chiller, cooling towers & dry coolers, economizers & evaporative coolers, and other cooling units.

Economizers and evaporative coolers are the fastest growing segment in the global market at a CAGR of more than 7% during the forecast period.

The growing adoption of various evaporative cooling solutions such as in-duct direct, exhaust air, direct, and indirect evaporative cooling systems that operate facilities at a PUE of less than 1.30 is propelling the growth of this segment in the global market. The introduction of water-side economizers or air/water-side economizer-based evaporative cooling systems is expected to transform the data center cooling market over the next few years. The increasing adoption of free cooling techniques across North America, Western Europe, Eastern Europe, and Nordic regions will boost the demand for these systems in the market. Adoption of these systems will be mostly focused towards a reduction in the consumption of electricity by facilities and

improving efficiency through reduced PUE and carbon emissions in the global market.

APAC to grow at a significant CAGR in the data center cooling market during the forecast period

The geographical segment in the data center cooling market is classified into America, EMEA, and APAC. APAC occupied a portion of the market share in 2017, growing at a CAGR of more than 7% during the forecast period. The extensive use of high-performance infrastructure solutions facilitating the installation of rack or row level cooling solutions is driving the growth of the APAC region in the global market. Large M&A activities such as ST Telemedia's acquisition of Tata Communication facilities in India and GDS Holdings in China, Equinix's acquisition of Bit Isle in Japan and Metronode in Australia, and CyrusOne's \$100 million investment in ST Telemedia GDS will create lucrative opportunities in the APAC market. Steady investments by hyperscale operators such as AWS, Microsoft, Google, Baidu, Alibaba, and Apple will result in higher revenues in the APAC market. The increasing focus on procuring renewable energy sources and use of chillers, precision air conditioners, and cooling towers will create lucrative opportunities for leading vendors in the APAC data center cooling market over the next few years.

Liquid-based cooling techniques segment to grow at a considerable CAGR in the data center cooling market during the forecast period

The data center cooling market by the cooling technique is divided into air-based cooling and liquid-based cooling. Liquid-based cooling technique segment dominated a portion of the market share in 2017, growing at a CAGR of around 4% during the forecast period. The launch of direct liquid cooling and immersion cooling techniques is augmenting the growth of this segment in the global market. The multiple facilities in North America, Europe, and Nordic operating through chilled-water cooling will boost the demand for liquid-based cooling techniques in the global market. For instance, Lefdal Mine DataCenter in Nordic uses nearby ocean water for cooling the facilities IT infrastructure. Furthermore, leading operators are focusing on installing on-site water tanks, water treatment, and recycling plants to reduce water consumption and attract new consumers to the data center cooling market. The adoption of innovative cooling systems is expected to have a positive impact on the growth of the overall global market.

### Key Vendor Analysis

The global data center cooling market includes many regional and global players who are intensifying the competition. The vendors are focusing on offering specific products or a complete range of infrastructure solutions to sustain the competition in the global market. The increase in innovations that lead to the development of new products will revolutionize the market over the next few years. The increased deployment of modular facilities in regions such as Southeast Asia (except Singapore), Latin America, MEA, and Eastern European countries will increase the competition in aid vendors to gain a larger market share and attract new sets of consumers. The adoption of energy efficient infrastructure and other innovative infrastructures that boost efficiency, reliability and availability of datacenter operations will boost revenues in the global data center cooling market.

The major vendors in the global market are:

Airedale Air Conditioning  
Rittal  
Schneider Electric  
STULZ  
Vertiv

Other prominent vendors include 3M, AIRSYS, Alfa Laval, Allied Control, Asetek, ClimateWorx International, Coolcentric (Wakefield-Vette), CoolIT Systems, Daikin Applied, Data Aire, Emicon, Geist Global, Green Revolution Cooling, KyotoCooling, Motivair Corp., Munters, Nortek Air Solutions, Nortek Humidity, Pentair, QCooling, and Trane.

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