

Global Data Center Energy-Saving Retrofit Service Market Research Report 2026(Status and Outlook)

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Abstracts

Data center energy-saving retrofits refer to systematic engineering projects that upgrade and optimize existing data center cooling systems, electrical systems, airflow organization, server energy efficiency, and monitoring systems to reduce overall energy consumption, improve energy efficiency ratios, and extend equipment lifespan. These typically include ventilation and air conditioning system upgrades, electrical system upgrades, IT equipment updates, energy consumption monitoring platform construction, and microgrid or waste heat recovery solution integration. In 2024, approximately 5,600 data center energy-saving retrofit projects were implemented, with an average cost of approximately US\$480,000 per project and a single production line capacity of approximately 120 projects per year. Upstream companies are mainly distributed in the fields of HVAC equipment, power electronics, battery energy storage, monitoring software, and building energy conservation, including suppliers of chillers, air handling systems, UPS, modular power supplies, energy-saving control algorithms, and smart sensors. Downstream companies include internet companies, telecommunications operators, financial institutions, government data centers, and large industrial parks. The gross profit margin is approximately 27%. In the product cost structure, electromechanical equipment accounts for approximately 40% of the total cost, system integration and construction accounts for approximately 35%, control and software accounts for approximately 15%, and the remainder is for commissioning and maintenance costs. Based on parameters, energy-saving retrofits can be categorized into four types: air conditioning system energy-saving retrofits, electrical system energy-saving retrofits, IT load optimization, and comprehensive energy efficiency management. Downstream demand is primarily concentrated in companies such as Alibaba Cloud, Tencent Cloud, Huawei Cloud, JD Technology, China Mobile, China Telecom, China Unicom, State Grid Data Center, Amazon AWS, and Google Data Center. In terms of policy drivers, global carbon neutrality and energy consumption

control policies are accelerating the green transformation of data centers; technological innovation is reflected in the rapid application of liquid cooling technology, variable frequency cooling, AI energy efficiency scheduling, and distributed energy management; and changing consumer demands are reflected in the growing demand for low PUE, high reliability, and energy-certified data centers. Overall, energy-saving retrofits have transitioned from upgrading individual equipment to system-level intelligent management, becoming a core direction for the sustainable development of data centers.

The global Data Center Energy-Saving Retrofit Service market size was estimated at USD 269.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 10.40% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Data Center Energy-Saving Retrofit Service market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Data Center Energy-Saving Retrofit Service market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Data Center Energy-Saving Retrofit Service market.

Global Data Center Energy-Saving Retrofit Service Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country),

key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

Vertiv
Johnson Controls
Santak
Carrier
Carel
Deerns
Huawei
H3C
Runjian
Shanghai Golden Bridge InfoTech
GDS Services
Shenzhen Bojian
Banyano

Market Segmentation (by Type)

Ventilation And Air Conditioning System Renovation
Electrical System Renovation
Others

Market Segmentation (by Application)

Small and Medium Scale Data Center
Large Scale Data Center
Hyper Large Scale Data Center

Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study

Neutral perspective on the market performance

Recent industry trends and developments

Competitive landscape & strategies of key players

Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value

In-depth analysis of the Data Center Energy-Saving Retrofit Service Market

Overview of the regional outlook of the Data Center Energy-Saving Retrofit Service Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future

development potential, and so on. It offers a high-level view of the current state of the Data Center Energy-Saving Retrofit Service Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Data Center Energy-Saving Retrofit Service, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development

potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

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Contents

1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE

- 1.1 Market Definition and Statistical Scope of Data Center Energy-Saving Retrofit Service
- 1.2 Key Market Segments
 - 1.2.1 Data Center Energy-Saving Retrofit Service Segment by Type
 - 1.2.2 Data Center Energy-Saving Retrofit Service Segment by Application
- 1.3 Methodology & Sources of Information
 - 1.3.1 Research Methodology
 - 1.3.2 Research Process
 - 1.3.3 Market Breakdown and Data Triangulation
 - 1.3.4 Base Year
 - 1.3.5 Report Assumptions & Caveats

2 DATA CENTER ENERGY-SAVING RETROFIT SERVICE MARKET OVERVIEW

- 2.1 Global Market Overview
 - 2.1.1 Global Data Center Energy-Saving Retrofit Service Market Size (M USD) Estimates and Forecasts (2020-2035)
 - 2.1.2 Global Data Center Energy-Saving Retrofit Service Sales Estimates and Forecasts (2020-2035)
- 2.2 Market Segment Executive Summary
- 2.3 Global Market Size by Region

3 DATA CENTER ENERGY-SAVING RETROFIT SERVICE MARKET COMPETITIVE LANDSCAPE

- 3.1 Company Assessment Quadrant
- 3.2 Global Data Center Energy-Saving Retrofit Service Product Life Cycle
- 3.3 Global Data Center Energy-Saving Retrofit Service Sales by Manufacturers (2020-2025)
- 3.4 Global Data Center Energy-Saving Retrofit Service Revenue Market Share by Manufacturers (2020-2025)
- 3.5 Data Center Energy-Saving Retrofit Service Market Share by Company Type (Tier 1, Tier 2, and Tier 3)
- 3.6 Global Data Center Energy-Saving Retrofit Service Average Price by Manufacturers (2020-2025)

3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types
3.8 Data Center Energy-Saving Retrofit Service Market Competitive Situation and Trends

3.8.1 Data Center Energy-Saving Retrofit Service Market Concentration Rate

3.8.2 Global 5 and 10 Largest Data Center Energy-Saving Retrofit Service Players
Market Share by Revenue

3.8.3 Mergers & Acquisitions, Expansion

4 DATA CENTER ENERGY-SAVING RETROFIT SERVICE INDUSTRY CHAIN ANALYSIS

4.1 Data Center Energy-Saving Retrofit Service Industry Chain Analysis

4.2 Market Overview of Key Raw Materials

4.3 Midstream Market Analysis

4.4 Downstream Customer Analysis

5 THE DEVELOPMENT AND DYNAMICS OF DATA CENTER ENERGY-SAVING RETROFIT SERVICE MARKET

5.1 Key Development Trends

5.2 Driving Factors

5.3 Market Challenges

5.4 Industry News

5.4.1 New Product Developments

5.4.2 Mergers & Acquisitions

5.4.3 Expansions

5.4.4 Collaboration/Supply Contracts

5.5 PEST Analysis

5.5.1 Industry Policies Analysis

5.5.2 Economic Environment Analysis

5.5.3 Social Environment Analysis

5.5.4 Technological Environment Analysis

5.6 Global Data Center Energy-Saving Retrofit Service Market Porter's Five Forces Analysis

5.6.1 Global Trade Frictions

5.6.2 U.S. Tariff Policy ? April 2025

5.6.3 Global Trade Frictions and Their Impacts to Data Center Energy-Saving Retrofit Service Market

5.7 ESG Ratings of Leading Companies

6 DATA CENTER ENERGY-SAVING RETROFIT SERVICE MARKET SEGMENTATION BY TYPE

- 6.1 Evaluation Matrix of Segment Market Development Potential (Type)
- 6.2 Global Data Center Energy-Saving Retrofit Service Sales Market Share by Type (2020-2025)
- 6.3 Global Data Center Energy-Saving Retrofit Service Market Size by Type (2020-2025)
- 6.4 Global Data Center Energy-Saving Retrofit Service Price by Type (2020-2025)

7 DATA CENTER ENERGY-SAVING RETROFIT SERVICE MARKET SEGMENTATION BY APPLICATION

- 7.1 Evaluation Matrix of Segment Market Development Potential (Application)
- 7.2 Global Data Center Energy-Saving Retrofit Service Market Sales by Application (2020-2025)
- 7.3 Global Data Center Energy-Saving Retrofit Service Market Size (M USD) by Application (2020-2025)
- 7.4 Global Data Center Energy-Saving Retrofit Service Sales Growth Rate by Application (2020-2025)

8 DATA CENTER ENERGY-SAVING RETROFIT SERVICE MARKET SALES BY REGION

- 8.1 Global Data Center Energy-Saving Retrofit Service Sales by Region
 - 8.1.1 Global Data Center Energy-Saving Retrofit Service Sales by Region
 - 8.1.2 Global Data Center Energy-Saving Retrofit Service Sales Market Share by Region
- 8.2 Global Data Center Energy-Saving Retrofit Service Market Size by Region
 - 8.2.1 Global Data Center Energy-Saving Retrofit Service Market Size by Region
 - 8.2.2 Global Data Center Energy-Saving Retrofit Service Market Size by Region
- 8.3 North America
 - 8.3.1 North America Data Center Energy-Saving Retrofit Service Sales by Country
 - 8.3.2 North America Data Center Energy-Saving Retrofit Service Market Size by Country
 - 8.3.3 U.S. Market Overview
 - 8.3.4 Canada Market Overview
 - 8.3.5 Mexico Market Overview

8.4 Europe

- 8.4.1 Europe Data Center Energy-Saving Retrofit Service Sales by Country
- 8.4.2 Europe Data Center Energy-Saving Retrofit Service Market Size by Country
- 8.4.3 Germany Market Overview
- 8.4.4 France Market Overview
- 8.4.5 U.K. Market Overview
- 8.4.6 Italy Market Overview
- 8.4.7 Spain Market Overview

8.5 Asia Pacific

- 8.5.1 Asia Pacific Data Center Energy-Saving Retrofit Service Sales by Region
- 8.5.2 Asia Pacific Data Center Energy-Saving Retrofit Service Market Size by Region
- 8.5.3 China Market Overview
- 8.5.4 Japan Market Overview
- 8.5.5 South Korea Market Overview
- 8.5.6 India Market Overview
- 8.5.7 Southeast Asia Market Overview

8.6 South America

- 8.6.1 South America Data Center Energy-Saving Retrofit Service Sales by Country
- 8.6.2 South America Data Center Energy-Saving Retrofit Service Market Size by Country
- 8.6.3 Brazil Market Overview
- 8.6.4 Argentina Market Overview
- 8.6.5 Columbia Market Overview

8.7 Middle East and Africa

- 8.7.1 Middle East and Africa Data Center Energy-Saving Retrofit Service Sales by Region
- 8.7.2 Middle East and Africa Data Center Energy-Saving Retrofit Service Market Size by Region
- 8.7.3 Saudi Arabia Market Overview
- 8.7.4 UAE Market Overview
- 8.7.5 Egypt Market Overview
- 8.7.6 Nigeria Market Overview
- 8.7.7 South Africa Market Overview

9 DATA CENTER ENERGY-SAVING RETROFIT SERVICE MARKET PRODUCTION BY REGION

9.1 Global Production of Data Center Energy-Saving Retrofit Service by Region(2020-2025)

9.2 Global Data Center Energy-Saving Retrofit Service Revenue Market Share by Region (2020-2025)

9.3 Global Data Center Energy-Saving Retrofit Service Production, Revenue, Price and Gross Margin (2020-2025)

9.4 North America Data Center Energy-Saving Retrofit Service Production

9.4.1 North America Data Center Energy-Saving Retrofit Service Production Growth Rate (2020-2025)

9.4.2 North America Data Center Energy-Saving Retrofit Service Production, Revenue, Price and Gross Margin (2020-2025)

9.5 Europe Data Center Energy-Saving Retrofit Service Production

9.5.1 Europe Data Center Energy-Saving Retrofit Service Production Growth Rate (2020-2025)

9.5.2 Europe Data Center Energy-Saving Retrofit Service Production, Revenue, Price and Gross Margin (2020-2025)

9.6 Japan Data Center Energy-Saving Retrofit Service Production (2020-2025)

9.6.1 Japan Data Center Energy-Saving Retrofit Service Production Growth Rate (2020-2025)

9.6.2 Japan Data Center Energy-Saving Retrofit Service Production, Revenue, Price and Gross Margin (2020-2025)

9.7 China Data Center Energy-Saving Retrofit Service Production (2020-2025)

9.7.1 China Data Center Energy-Saving Retrofit Service Production Growth Rate (2020-2025)

9.7.2 China Data Center Energy-Saving Retrofit Service Production, Revenue, Price and Gross Margin (2020-2025)

10 KEY COMPANIES PROFILE

10.1 Vertiv

10.1.1 Vertiv Basic Information

10.1.2 Vertiv Data Center Energy-Saving Retrofit Service Product Overview

10.1.3 Vertiv Data Center Energy-Saving Retrofit Service Product Market Performance

10.1.4 Vertiv Business Overview

10.1.5 Vertiv SWOT Analysis

10.1.6 Vertiv Recent Developments

10.2 Johnson Controls

10.2.1 Johnson Controls Basic Information

10.2.2 Johnson Controls Data Center Energy-Saving Retrofit Service Product Overview

10.2.3 Johnson Controls Data Center Energy-Saving Retrofit Service Product Market

Performance

- 10.2.4 Johnson Controls Business Overview
- 10.2.5 Johnson Controls SWOT Analysis
- 10.2.6 Johnson Controls Recent Developments

10.3 Santak

- 10.3.1 Santak Basic Information
- 10.3.2 Santak Data Center Energy-Saving Retrofit Service Product Overview
- 10.3.3 Santak Data Center Energy-Saving Retrofit Service Product Market

Performance

- 10.3.4 Santak Business Overview
- 10.3.5 Santak SWOT Analysis
- 10.3.6 Santak Recent Developments

10.4 Carrier

- 10.4.1 Carrier Basic Information
- 10.4.2 Carrier Data Center Energy-Saving Retrofit Service Product Overview
- 10.4.3 Carrier Data Center Energy-Saving Retrofit Service Product Market

Performance

- 10.4.4 Carrier Business Overview
- 10.4.5 Carrier Recent Developments

10.5 Carel

- 10.5.1 Carel Basic Information
- 10.5.2 Carel Data Center Energy-Saving Retrofit Service Product Overview
- 10.5.3 Carel Data Center Energy-Saving Retrofit Service Product Market Performance
- 10.5.4 Carel Business Overview
- 10.5.5 Carel Recent Developments

10.6 Deerns

- 10.6.1 Deerns Basic Information
- 10.6.2 Deerns Data Center Energy-Saving Retrofit Service Product Overview
- 10.6.3 Deerns Data Center Energy-Saving Retrofit Service Product Market

Performance

- 10.6.4 Deerns Business Overview
- 10.6.5 Deerns Recent Developments

10.7 Huawei

- 10.7.1 Huawei Basic Information
- 10.7.2 Huawei Data Center Energy-Saving Retrofit Service Product Overview
- 10.7.3 Huawei Data Center Energy-Saving Retrofit Service Product Market

Performance

- 10.7.4 Huawei Business Overview
- 10.7.5 Huawei Recent Developments

10.8 H3C

10.8.1 H3C Basic Information

10.8.2 H3C Data Center Energy-Saving Retrofit Service Product Overview

10.8.3 H3C Data Center Energy-Saving Retrofit Service Product Market Performance

10.8.4 H3C Business Overview

10.8.5 H3C Recent Developments

10.9 Runjian

10.9.1 Runjian Basic Information

10.9.2 Runjian Data Center Energy-Saving Retrofit Service Product Overview

10.9.3 Runjian Data Center Energy-Saving Retrofit Service Product Market

Performance

10.9.4 Runjian Business Overview

10.9.5 Runjian Recent Developments

10.10 Shanghai Golden Bridge InfoTech

10.10.1 Shanghai Golden Bridge InfoTech Basic Information

10.10.2 Shanghai Golden Bridge InfoTech Data Center Energy-Saving Retrofit Service Product Overview

10.10.3 Shanghai Golden Bridge InfoTech Data Center Energy-Saving Retrofit Service Product Market Performance

10.10.4 Shanghai Golden Bridge InfoTech Business Overview

10.10.5 Shanghai Golden Bridge InfoTech Recent Developments

10.11 GDS Services

10.11.1 GDS Services Basic Information

10.11.2 GDS Services Data Center Energy-Saving Retrofit Service Product Overview

10.11.3 GDS Services Data Center Energy-Saving Retrofit Service Product Market

Performance

10.11.4 GDS Services Business Overview

10.11.5 GDS Services Recent Developments

10.12 Shenzhen Bojian

10.12.1 Shenzhen Bojian Basic Information

10.12.2 Shenzhen Bojian Data Center Energy-Saving Retrofit Service Product Overview

10.12.3 Shenzhen Bojian Data Center Energy-Saving Retrofit Service Product Market Performance

10.12.4 Shenzhen Bojian Business Overview

10.12.5 Shenzhen Bojian Recent Developments

10.13 Banyano

10.13.1 Banyano Basic Information

10.13.2 Banyano Data Center Energy-Saving Retrofit Service Product Overview

10.13.3 Banyano Data Center Energy-Saving Retrofit Service Product Market Performance

10.13.4 Banyano Business Overview

10.13.5 Banyano Recent Developments

11 DATA CENTER ENERGY-SAVING RETROFIT SERVICE MARKET FORECAST BY REGION

11.1 Global Data Center Energy-Saving Retrofit Service Market Size Forecast

11.2 Global Data Center Energy-Saving Retrofit Service Market Forecast by Region

11.2.1 North America Market Size Forecast by Country

11.2.2 Europe Data Center Energy-Saving Retrofit Service Market Size Forecast by Country

11.2.3 Asia Pacific Data Center Energy-Saving Retrofit Service Market Size Forecast by Region

11.2.4 South America Data Center Energy-Saving Retrofit Service Market Size Forecast by Country

11.2.5 Middle East and Africa Forecasted Sales of Data Center Energy-Saving Retrofit Service by Country

12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)

12.1 Global Data Center Energy-Saving Retrofit Service Market Forecast by Type (2026-2035)

12.1.1 Global Forecasted Sales of Data Center Energy-Saving Retrofit Service by Type (2026-2035)

12.1.2 Global Data Center Energy-Saving Retrofit Service Market Size Forecast by Type (2026-2035)

12.1.3 Global Forecasted Price of Data Center Energy-Saving Retrofit Service by Type (2026-2035)

12.2 Global Data Center Energy-Saving Retrofit Service Market Forecast by Application (2026-2035)

12.2.1 Global Data Center Energy-Saving Retrofit Service Sales (K Units) Forecast by Application

12.2.2 Global Data Center Energy-Saving Retrofit Service Market Size (M USD) Forecast by Application (2026-2035)

13 CONCLUSION AND KEY FINDINGS

List Of Tables

LIST OF TABLES

Table 1. Introduction of the Type

Table 2. Introduction of the Application

Table 3. Global Data Center Energy-Saving Retrofit Service Market Size by Type (M USD)

Table 4. Global Data Center Energy-Saving Retrofit Service Market Size by Application

Table 5. Data Center Energy-Saving Retrofit Service Market Size Comparison by Region (M USD)

Table 6. Global Data Center Energy-Saving Retrofit Service Sales (K Units) by Manufacturers (2020-2025)

Table 7. Global Data Center Energy-Saving Retrofit Service Sales Market Share by Manufacturers (2020-2025)

Table 8. Global Data Center Energy-Saving Retrofit Service Revenue (M USD) by Manufacturers (2020-2025)

Table 9. Global Data Center Energy-Saving Retrofit Service Revenue Share by Manufacturers (2020-2025)

Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in Data Center Energy-Saving Retrofit Service as of 2025)

Table 11. Global Market Data Center Energy-Saving Retrofit Service Average Price (USD/Unit) of Key Manufacturers (2020-2025)

Table 12. Manufacturers? Manufacturing Sites, Areas Served

Table 13. Manufacturers? Product Type

Table 14. Global Data Center Energy-Saving Retrofit Service Manufacturers Market Concentration Ratio (CR5 and HHI)

Table 15. Mergers & Acquisitions, Expansion Plans

Table 16. Market Overview of Key Raw Materials

Table 17. Midstream Market Analysis

Table 18. Downstream Customer Analysis

Table 19. Key Development Trends

Table 20. Driving Factors

Table 21. Data Center Energy-Saving Retrofit Service Market Challenges

Table 22. Goldman Sachs' forecast real GDP growth rate for 2025-2026

Table 23. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027

Table 24. World Bank ' Forecast Real GDP Growth Rate For 2025-2026

Table 25. The Tariff Rates Imposed by the United States on Major Commodity Trading Countries

Table 26. Global Data Center Energy-Saving Retrofit Service Sales by Type (K Units)

Table 27. Global Data Center Energy-Saving Retrofit Service Market Size by Type (M USD)

Table 28. Global Data Center Energy-Saving Retrofit Service Sales (K Units) by Type (2020-2025)

Table 29. Global Data Center Energy-Saving Retrofit Service Sales Market Share by Type (2020-2025)

Table 30. Global Data Center Energy-Saving Retrofit Service Market Size (M USD) by Type (2020-2025)

Table 31. Global Data Center Energy-Saving Retrofit Service Market Share by Type (2020-2025)

Table 32. Global Data Center Energy-Saving Retrofit Service Price (USD/Unit) by Type (2020-2025)

Table 33. Global Data Center Energy-Saving Retrofit Service Sales (K Units) by Application

Table 34. Global Data Center Energy-Saving Retrofit Service Market Size by Application

Table 35. Global Data Center Energy-Saving Retrofit Service Sales by Application (2020-2025) & (K Units)

Table 36. Global Data Center Energy-Saving Retrofit Service Sales Market Share by Application (2020-2025)

Table 37. Global Data Center Energy-Saving Retrofit Service Market Size by Application (2020-2025) & (M USD)

Table 38. Global Data Center Energy-Saving Retrofit Service Market Share by Application (2020-2025)

Table 39. Global Data Center Energy-Saving Retrofit Service Sales Growth Rate by Application (2020-2025)

Table 40. Global Data Center Energy-Saving Retrofit Service Sales by Region (2020-2025) & (K Units)

Table 41. Global Data Center Energy-Saving Retrofit Service Sales Market Share by Region (2020-2025)

Table 42. Global Data Center Energy-Saving Retrofit Service Market Size by Region (2020-2025) & (M USD)

Table 43. Global Data Center Energy-Saving Retrofit Service Market Size by Region (2020-2025)

Table 44. North America Data Center Energy-Saving Retrofit Service Sales by Country (2020-2025) & (K Units)

Table 45. North America Data Center Energy-Saving Retrofit Service Market Size by Country (2020-2025) & (M USD)

- Table 46. Europe Data Center Energy-Saving Retrofit Service Sales by Country (2020-2025) & (K Units)
- Table 47. Europe Data Center Energy-Saving Retrofit Service Market Size by Country (2020-2025) & (M USD)
- Table 48. Asia Pacific Data Center Energy-Saving Retrofit Service Sales by Region (2020-2025) & (K Units)
- Table 49. Asia Pacific Data Center Energy-Saving Retrofit Service Market Size by Region (2020-2025) & (M USD)
- Table 50. South America Data Center Energy-Saving Retrofit Service Sales by Country (2020-2025) & (K Units)
- Table 51. South America Data Center Energy-Saving Retrofit Service Market Size by Country (2020-2025) & (M USD)
- Table 52. Middle East and Africa Data Center Energy-Saving Retrofit Service Sales by Region (2020-2025) & (K Units)
- Table 53. Middle East and Africa Data Center Energy-Saving Retrofit Service Market Size by Region (2020-2025) & (M USD)
- Table 54. Global Data Center Energy-Saving Retrofit Service Production (K Units) by Region(2020-2025)
- Table 55. Global Data Center Energy-Saving Retrofit Service Revenue (US\$ Million) by Region (2020-2025)
- Table 56. Global Data Center Energy-Saving Retrofit Service Revenue Market Share by Region (2020-2025)
- Table 57. Global Data Center Energy-Saving Retrofit Service Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 58. North America Data Center Energy-Saving Retrofit Service Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 59. Europe Data Center Energy-Saving Retrofit Service Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 60. Japan Data Center Energy-Saving Retrofit Service Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 61. China Data Center Energy-Saving Retrofit Service Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 62. Vertiv Basic Information
- Table 63. Vertiv Data Center Energy-Saving Retrofit Service Product Overview
- Table 64. Vertiv Data Center Energy-Saving Retrofit Service Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 65. Vertiv Business Overview
- Table 66. Vertiv SWOT Analysis
- Table 67. Vertiv Recent Developments

- Table 68. Johnson Controls Basic Information
- Table 69. Johnson Controls Data Center Energy-Saving Retrofit Service Product Overview
- Table 70. Johnson Controls Data Center Energy-Saving Retrofit Service Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 71. Johnson Controls Business Overview
- Table 72. Johnson Controls SWOT Analysis
- Table 73. Johnson Controls Recent Developments
- Table 74. Santak Basic Information
- Table 75. Santak Data Center Energy-Saving Retrofit Service Product Overview
- Table 76. Santak Data Center Energy-Saving Retrofit Service Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 77. Santak Business Overview
- Table 78. Santak SWOT Analysis
- Table 79. Santak Recent Developments
- Table 80. Carrier Basic Information
- Table 81. Carrier Data Center Energy-Saving Retrofit Service Product Overview
- Table 82. Carrier Data Center Energy-Saving Retrofit Service Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 83. Carrier Business Overview
- Table 84. Carrier Recent Developments
- Table 85. Carel Basic Information
- Table 86. Carel Data Center Energy-Saving Retrofit Service Product Overview
- Table 87. Carel Data Center Energy-Saving Retrofit Service Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 88. Carel Business Overview
- Table 89. Carel Recent Developments
- Table 90. Deerns Basic Information
- Table 91. Deerns Data Center Energy-Saving Retrofit Service Product Overview
- Table 92. Deerns Data Center Energy-Saving Retrofit Service Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 93. Deerns Business Overview
- Table 94. Deerns Recent Developments
- Table 95. Huawei Basic Information
- Table 96. Huawei Data Center Energy-Saving Retrofit Service Product Overview
- Table 97. Huawei Data Center Energy-Saving Retrofit Service Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 98. Huawei Business Overview
- Table 99. Huawei Recent Developments

- Table 100. H3C Basic Information
- Table 101. H3C Data Center Energy-Saving Retrofit Service Product Overview
- Table 102. H3C Data Center Energy-Saving Retrofit Service Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 103. H3C Business Overview
- Table 104. H3C Recent Developments
- Table 105. Runjian Basic Information
- Table 106. Runjian Data Center Energy-Saving Retrofit Service Product Overview
- Table 107. Runjian Data Center Energy-Saving Retrofit Service Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 108. Runjian Business Overview
- Table 109. Runjian Recent Developments
- Table 110. Shanghai Golden Bridge InfoTech Basic Information
- Table 111. Shanghai Golden Bridge InfoTech Data Center Energy-Saving Retrofit Service Product Overview
- Table 112. Shanghai Golden Bridge InfoTech Data Center Energy-Saving Retrofit Service Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 113. Shanghai Golden Bridge InfoTech Business Overview
- Table 114. Shanghai Golden Bridge InfoTech Recent Developments
- Table 115. GDS Services Basic Information
- Table 116. GDS Services Data Center Energy-Saving Retrofit Service Product Overview
- Table 117. GDS Services Data Center Energy-Saving Retrofit Service Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 118. GDS Services Business Overview
- Table 119. GDS Services Recent Developments
- Table 120. Shenzhen Bojian Basic Information
- Table 121. Shenzhen Bojian Data Center Energy-Saving Retrofit Service Product Overview
- Table 122. Shenzhen Bojian Data Center Energy-Saving Retrofit Service Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 123. Shenzhen Bojian Business Overview
- Table 124. Shenzhen Bojian Recent Developments
- Table 125. Banyano Basic Information
- Table 126. Banyano Data Center Energy-Saving Retrofit Service Product Overview
- Table 127. Banyano Data Center Energy-Saving Retrofit Service Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 128. Banyano Business Overview

Table 129. Banyano Recent Developments

Table 130. Global Data Center Energy-Saving Retrofit Service Sales Forecast by Region (2026-2035) & (K Units)

Table 131. Global Data Center Energy-Saving Retrofit Service Market Size Forecast by Region (2026-2035) & (M USD)

Table 132. North America Data Center Energy-Saving Retrofit Service Sales Forecast by Country (2026-2035) & (K Units)

Table 133. North America Data Center Energy-Saving Retrofit Service Market Size Forecast by Country (2026-2035) & (M USD)

Table 134. Europe Data Center Energy-Saving Retrofit Service Sales Forecast by Country (2026-2035) & (K Units)

Table 135. Europe Data Center Energy-Saving Retrofit Service Market Size Forecast by Country (2026-2035) & (M USD)

Table 136. Asia Pacific Data Center Energy-Saving Retrofit Service Sales Forecast by Region (2026-2035) & (K Units)

Table 137. Asia Pacific Data Center Energy-Saving Retrofit Service Market Size Forecast by Region (2026-2035) & (M USD)

Table 138. South America Data Center Energy-Saving Retrofit Service Sales Forecast by Country (2026-2035) & (K Units)

Table 139. South America Data Center Energy-Saving Retrofit Service Market Size Forecast by Country (2026-2035) & (M USD)

Table 140. Middle East and Africa Data Center Energy-Saving Retrofit Service Sales Forecast by Country (2026-2035) & (Units)

Table 141. Middle East and Africa Data Center Energy-Saving Retrofit Service Market Size Forecast by Country (2026-2035) & (M USD)

Table 142. Global Data Center Energy-Saving Retrofit Service Sales Forecast by Type (2026-2035) & (K Units)

Table 143. Global Data Center Energy-Saving Retrofit Service Market Size Forecast by Type (2026-2035) & (M USD)

Table 144. Global Data Center Energy-Saving Retrofit Service Price Forecast by Type (2026-2035) & (USD/Unit)

Table 145. Global Data Center Energy-Saving Retrofit Service Sales (K Units) Forecast by Application (2026-2035)

Table 146. Global Data Center Energy-Saving Retrofit Service Market Size Forecast by Application (2026-2035) & (M USD)

List Of Figures

LIST OF FIGURES

- Figure 1. Product Picture of Data Center Energy-Saving Retrofit Service
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global Data Center Energy-Saving Retrofit Service Market Size (M USD), 2025-2035
- Figure 5. Global Data Center Energy-Saving Retrofit Service Market Size (M USD) (2020-2035)
- Figure 6. Global Data Center Energy-Saving Retrofit Service Sales (K Units) & (2020-2035)
- Figure 7. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 8. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 9. Evaluation Matrix of Regional Market Development Potential
- Figure 10. Data Center Energy-Saving Retrofit Service Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global Data Center Energy-Saving Retrofit Service Product Life Cycle
- Figure 13. Data Center Energy-Saving Retrofit Service Sales Share by Manufacturers in 2025
- Figure 14. Global Data Center Energy-Saving Retrofit Service Revenue Share by Manufacturers in 2025
- Figure 15. Data Center Energy-Saving Retrofit Service Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market Data Center Energy-Saving Retrofit Service Average Price (USD/Unit) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by Data Center Energy-Saving Retrofit Service Revenue in 2025
- Figure 18. Industry Chain Map of Data Center Energy-Saving Retrofit Service
- Figure 19. Global Data Center Energy-Saving Retrofit Service Market PEST Analysis
- Figure 20. Global Data Center Energy-Saving Retrofit Service Market Porter's Five Forces Analysis
- Figure 21. Global Merchandise Trade as a Percentage Of GDP
- Figure 22. US - Imports of Goods by Country
- Figure 23. China Exports by Country
- Figure 24. ESG Rating Distribution of The Leading Company Compared With Its Peers
- Figure 25. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 26. Global Data Center Energy-Saving Retrofit Service Market Share by Type

Figure 27. Sales Market Share of Data Center Energy-Saving Retrofit Service by Type (2020-2025)

Figure 28. Sales Market Share of Data Center Energy-Saving Retrofit Service by Type in 2025

Figure 29. Market Share of Data Center Energy-Saving Retrofit Service by Type (2020-2025)

Figure 30. Market Share of Data Center Energy-Saving Retrofit Service by Type in 2025

Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)

Figure 32. Global Data Center Energy-Saving Retrofit Service Market Share by Application

Figure 33. Global Data Center Energy-Saving Retrofit Service Sales Market Share by Application (2020-2025)

Figure 34. Global Data Center Energy-Saving Retrofit Service Sales Market Share by Application in 2025

Figure 35. Global Data Center Energy-Saving Retrofit Service Market Share by Application (2020-2025)

Figure 36. Global Data Center Energy-Saving Retrofit Service Market Share by Application in 2025

Figure 37. Global Data Center Energy-Saving Retrofit Service Sales Growth Rate by Application (2020-2025)

Figure 38. Global Data Center Energy-Saving Retrofit Service Sales Market Share by Region (2020-2025)

Figure 39. Global Data Center Energy-Saving Retrofit Service Market Size by Region (2020-2025)

Figure 40. North America Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 41. North America Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 42. North America Data Center Energy-Saving Retrofit Service Sales Market Share by Country in 2024

Figure 43. North America Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 44. North America Data Center Energy-Saving Retrofit Service Market Size by Country in 2024

Figure 45. U.S. Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 46. U.S. Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 47. Canada Data Center Energy-Saving Retrofit Service Sales (K Units) and

Growth Rate (2020-2025)

Figure 48. Canada Data Center Energy-Saving Retrofit Service Market Size (M USD) and Growth Rate (2020-2025)

Figure 49. Mexico Data Center Energy-Saving Retrofit Service Sales (Units) and Growth Rate (2020-2025)

Figure 50. Mexico Data Center Energy-Saving Retrofit Service Market Size (Units) and Growth Rate (2020-2025)

Figure 51. Europe Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 52. Europe Data Center Energy-Saving Retrofit Service Sales Market Share by Country in 2024

Figure 53. Europe Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 54. Europe Data Center Energy-Saving Retrofit Service Market Size by Country in 2024

Figure 55. Germany Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 56. Germany Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 57. France Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 58. France Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 59. U.K. Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 60. U.K. Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 62. Italy Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 64. Spain Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific Data Center Energy-Saving Retrofit Service Sales and Growth Rate (K Units)

Figure 66. Asia Pacific Data Center Energy-Saving Retrofit Service Sales Market Share by Region in 2024

Figure 67. Asia Pacific Data Center Energy-Saving Retrofit Service Market Size by Region in 2024

Figure 68. China Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 69. China Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 71. Japan Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 72. South Korea Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 73. South Korea Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 74. India Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 75. India Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 76. Southeast Asia Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 77. Southeast Asia Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 78. South America Data Center Energy-Saving Retrofit Service Sales and Growth Rate (K Units)

Figure 79. South America Data Center Energy-Saving Retrofit Service Sales Market Share by Country in 2024

Figure 80. South America Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (M USD)

Figure 81. South America Data Center Energy-Saving Retrofit Service Market Size by Country in 2024

Figure 82. Brazil Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 83. Brazil Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 84. Argentina Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 85. Argentina Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 86. Columbia Data Center Energy-Saving Retrofit Service Sales and Growth

Rate (2020-2025) & (K Units)

Figure 87. Columbia Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 88. Middle East and Africa Data Center Energy-Saving Retrofit Service Sales and Growth Rate (K Units)

Figure 89. Middle East and Africa Data Center Energy-Saving Retrofit Service Sales Market Share by Region in 2024

Figure 90. Middle East and Africa Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (M USD)

Figure 91. Middle East and Africa Data Center Energy-Saving Retrofit Service Market Size by Region in 2024

Figure 92. Saudi Arabia Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 93. Saudi Arabia Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 94. UAE Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 95. UAE Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 96. Egypt Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 97. Egypt Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 98. Nigeria Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 99. Nigeria Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 100. South Africa Data Center Energy-Saving Retrofit Service Sales and Growth Rate (2020-2025) & (K Units)

Figure 101. South Africa Data Center Energy-Saving Retrofit Service Market Size and Growth Rate (2020-2025) & (M USD)

Figure 102. Global Data Center Energy-Saving Retrofit Service Production Market Share by Region (2020-2025)

Figure 103. North America Data Center Energy-Saving Retrofit Service Production (K Units) Growth Rate (2020-2025)

Figure 104. Europe Data Center Energy-Saving Retrofit Service Production (K Units) Growth Rate (2020-2025)

Figure 105. Japan Data Center Energy-Saving Retrofit Service Production (K Units) Growth Rate (2020-2025)

Figure 106. China Data Center Energy-Saving Retrofit Service Production (K Units) Growth Rate (2020-2025)

Figure 107. Global Data Center Energy-Saving Retrofit Service Sales Forecast by Volume (2020-2035) & (K Units)

Figure 108. Global Data Center Energy-Saving Retrofit Service Market Size Forecast by Value (2020-2035) & (M USD)

Figure 109. Global Data Center Energy-Saving Retrofit Service Sales Market Share Forecast by Type (2026-2035)

Figure 110. Global Data Center Energy-Saving Retrofit Service Market Share Forecast by Type (2026-2035)

Figure 111. Global Data Center Energy-Saving Retrofit Service Sales Forecast by Application (2026-2035)

Figure 112. Global Data Center Energy-Saving Retrofit Service Market Share Forecast by Application (2026-2035)

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