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

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Abstracts

Data center hardware energy-saving retrofitting refers to a comprehensive technical transformation process that optimizes and upgrades data center hardware such as cooling, power supply, servers, power distribution, and monitoring systems to reduce energy consumption, improve energy efficiency ratio, and extend equipment life. It mainly covers the replacement of high-efficiency cooling systems, optimization of UPS and power supply systems, replacement of liquid-cooled servers, and deployment of intelligent energy management systems. In 2024, the industry's average gross profit margin was approximately 25%-30%. Upstream companies mainly include semiconductor power device manufacturers, cooling equipment manufacturers, power system suppliers, and sensing and monitoring system manufacturers, belonging to the fields of electronic components, electromechanical equipment, and industrial automation. Downstream companies are mainly concentrated in the fields of internet data center operators, communication equipment manufacturers, government information engineering projects, cloud computing service providers, and large enterprises building their own data centers. In the product cost structure, hardware equipment accounts for approximately 65% ??of the total cost, installation, commissioning, and engineering services account for 20%, and software control and monitoring systems account for approximately 15%. Classified by parameters, it mainly includes energy-saving categories such as cooling systems, power supply and UPS, servers and racks, and monitoring and energy management systems. On the demand side, the downstream demand list includes internet data centers, financial data centers, government cloud platforms, operator data centers, AI computing centers, and university research computing centers. The downstream customer list covers China Mobile, China Telecom, China Unicom, Alibaba Cloud, Tencent Cloud, Huawei Cloud, Baidu AI Cloud, JD Technology, ByteDance, and provincial and municipal government information centers. On the business opportunity side, policy drivers mainly come from

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the national "Eastern Data, Western Computing" project, the "Dual Carbon" strategy, and the "Green Data Center Construction Guidelines," which are accelerating the implementation of energy-saving renovations. Technological innovation is driven by the mature application of liquid cooling, phase change cooling, AI intelligent energy management, and modular power supply and distribution technologies. Changing consumer demands are reflected in the growing demand for data centers with high computing power, high reliability, and low PUE values, driving energy-saving hardware renovations to evolve from localized energy saving to a more systematic, intelligent, and sustainable approach.

The global Data Center Hardware Energy-Saving Retrofit market size was estimated at USD 231.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 9.20% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Data Center Hardware Energy-Saving Retrofit 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 Hardware Energy-Saving Retrofit 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 Hardware Energy-Saving Retrofit market.

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

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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
Runjian
Shanghai Golden Bridge InfoTech

Market Segmentation (by Type)

Ventilation And Air Conditioning System Renovation
Electrical System Renovation
Others

Market Segmentation (by Application)

Small And Medium-Sized Data Centers
Large Data Centers
Ultra-Large Data Centers

Geographic Segmentation

North America (USA, Canada, Mexico)

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

Customization of the Report

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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 Hardware Energy-Saving Retrofit 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

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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 Hardware Energy-Saving Retrofit, 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

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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

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