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Global High-Density UPS Systems for Liquid-Cooled Data Halls Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global High-Density UPS Systems for Liquid-Cooled Data Halls market size was valued at US$ 2727 million in 2025 and is forecast to a readjusted size of US$ 6425 million by 2032 with a CAGR of 12.5% during review period.

High-density UPS systems for liquid-cooled data halls refer to three-phase online, modular or high-power uninterruptible power supply systems deployed in AI data centres, high-density compute facilities, colocation data centres, cloud campuses and mission-critical enterprise data halls. Their primary function is to maintain continuous, conditioned and stable power to GPU clusters, servers, storage, networking equipment, critical control systems and downstream power distribution chains during grid disturbances, short interruptions, voltage deviations or upstream source transfers. These systems typically employ online double-conversion architecture, IGBT or advanced power semiconductor technology, three-level topology, hot-swappable power modules, N+X redundancy, lithium-ion battery compatibility, intelligent monitoring and high-efficiency operating modes. Typical system ratings range from around 200 kVA to above 2.5 MW, with common power module sizes including 50 kW, 100 kW, 250 kW and 300 kW.

Based on public project experience and industry quotation practice, the indicative UPS mainframe price is commonly assessed in the range of approximately USD 80?250 per kVA, while turnkey systems including lithium-ion battery cabinets, bypass cabinets, switchgear, installation, commissioning and monitoring may command materially higher project-level prices. This report focuses on UPS mainframes and closely integrated modular power units serving high-density and liquid-cooled data hall environments.

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Based on our research, this topic should not be treated as a conventional ?liquid-cooled UPS? category in a literal sense. The more robust market definition is high-density UPS systems deployed in liquid-cooled or AI-oriented data halls. Liquid cooling changes the density, layout and thermal envelope of the data hall, but the UPS remains part of the critical power chain. The relevant products are therefore high-power three-phase online UPS systems, modular UPS platforms, megawatt-scale UPS systems and lithium-ion-compatible UPS architectures designed for high-density computing environments. This distinction is important because a literal interpretation of ?liquid-cooled UPS? would artificially narrow the supplier base and include only a very small number of experimental or special-purpose systems, while excluding the mainstream products actually procured by hyperscale, colocation and AI data centre operators.

From a supply-side perspective, the competitive landscape is led by global electrical and critical infrastructure groups, followed by regional power-electronics specialists and China-based modular UPS manufacturers. Schneider Electric, Vertiv, Eaton and ABB have strong global project access, service networks and data-centre infrastructure portfolios. Socomec, Riello UPS, Legrand, Borri and Piller provide important European depth in high-reliability critical power applications. Huawei Digital Power, Delta Electronics, Kehua Data, KSTAR, East Group and INVT represent a strong Asian and Chinese supply base, particularly in modular architecture, high power density, cost competitiveness and local delivery. The industry should therefore be analysed through a layered supplier framework rather than by revenue ranking alone, because many credible manufacturers do not separately disclose high-density data centre UPS revenue.

Demand is being structurally reshaped by AI training clusters, AI inference facilities, hyperscale cloud campuses and liquid-cooled data hall retrofits. As rack power densities rise, the UPS system is increasingly evaluated not only by backup duration, but also by footprint, efficiency at partial load, redundancy architecture, battery compatibility, maintainability, monitoring capability and integration with upstream and downstream electrical systems. The growth of data centre electricity consumption, together with the emergence of 800 VDC power architecture for future AI factories, suggests that critical power systems will become more deeply integrated with energy storage, power distribution, monitoring software and thermal infrastructure. This creates opportunities for suppliers with broader electrical architecture capabilities, while increasing pressure on vendors that remain confined to low-power or commodity UPS products.

The market is expected to remain in a structural growth phase, although its technical

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boundary may evolve. In the near term, modular online UPS systems, lithium-ion-compatible UPS systems and megawatt-class scalable UPS platforms will remain the mainstream procurement categories. Over the longer term, high-voltage DC distribution, solid-state transformers, rack-level power shelves, grid-interactive storage and AI-driven energy management may alter the traditional role of AC UPS systems. The strategic question is therefore not whether UPS demand will disappear, but whether the value pool will migrate from standalone UPS mainframes to integrated critical power architectures. Suppliers able to combine UPS, switchgear, batteries, software, thermal management and service capabilities are better positioned to capture this transition.

This report is a detailed and comprehensive analysis for global High-Density UPS Systems for Liquid-Cooled Data Halls market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Product Architecture and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global High-Density UPS Systems for Liquid-Cooled Data Halls market size and forecasts, in consumption value ($ Million), sales quantity (MW), and average selling prices (US$/KW), 2021-2032

Global High-Density UPS Systems for Liquid-Cooled Data Halls market size and forecasts by region and country, in consumption value ($ Million), sales quantity (MW), and average selling prices (US$/KW), 2021-2032

Global High-Density UPS Systems for Liquid-Cooled Data Halls market size and forecasts, by Product Architecture and by Application, in consumption value ($ Million), sales quantity (MW), and average selling prices (US$/KW), 2021-2032

Global High-Density UPS Systems for Liquid-Cooled Data Halls market shares of main players, shipments in revenue ($ Million), sales quantity (MW), and ASP (US$/KW), 2021-2026

The Primary Objectives in This Report Are:

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To determine the size of the total market opportunity of global and key countries

To assess the growth potential for High-Density UPS Systems for Liquid-Cooled Data Halls

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global High-Density UPS Systems for Liquid-Cooled Data Halls market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Schneider Electric, Vertiv, Huawei Digital Power, Eaton, ABB, Delta Electronics, Socomec, Kehua Data, KSTAR, East Group, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

High-Density UPS Systems for Liquid-Cooled Data Halls market is split by Product Architecture and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Product Architecture, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Product Architecture

Modular UPS

Monolithic High-Power UPS

Scalable UPS System

Other

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Market segment by Power Rating

200?500 kVA

501?1200 kVA

Above 1200 kVA

Other

Market segment by Energy Storage Compatibility

VRLA-Compatible UPS

Lithium-ion-Ready UPS

Flywheel-Integrated UPS

Other

Market segment by Application

AI Training Data Centers

AI Inference / Cloud Data Centers

Colocation Data Centers

Enterprise / Government Critical Data Halls

Other

Major players covered

Schneider Electric

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Vertiv

Huawei Digital Power

Eaton

ABB

Delta Electronics

Socomec

Kehua Data

KSTAR

East Group

INVT Power

Mitsubishi Electric

Fuji Electric

Riello UPS

Legrand

Borri

Piller

CyberPower

Sicon Chat Union

Sicon EMI

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Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe High-Density UPS Systems for Liquid-Cooled Data Halls product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of High-Density UPS Systems for Liquid-Cooled Data Halls, with price, sales quantity, revenue, and global market share of High-Density UPS Systems for Liquid-Cooled Data Halls from 2021 to 2026.

Chapter 3, the High-Density UPS Systems for Liquid-Cooled Data Halls competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the High-Density UPS Systems for Liquid-Cooled Data Halls breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Product Architecture and by Application, with sales market share and growth rate by Product Architecture, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and High-Density UPS Systems for Liquid-Cooled Data Halls market forecast, by regions, by Product Architecture, and by Application, with sales and revenue, from

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2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of High-Density UPS Systems for Liquid-Cooled Data Halls.

Chapter 14 and 15, to describe High-Density UPS Systems for Liquid-Cooled Data Halls sales channel, distributors, customers, research findings and conclusion.

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Contents

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3 COMPETITIVE ENVIRONMENT: HIGH-DENSITY UPS SYSTEMS FOR LIQUID-COOLED DATA HALLS BY MANUFACTURER

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List Of Tables

LIST OF TABLES

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Table 195. Switched Inductor Charger ICs Typical Customers

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List Of Figures

LIST OF FIGURES

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