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Global Measurement Instruments for Data Center Supply, Demand and Key Producers, 2026-2032

https://marketpublishers.com/r/GCCB5E102C98EN.html
Date: September 2026
Pages: 227
Price: US$ 4,480.00 (Single User License)
ID: GCCB5E102C98EN

Abstracts

The global Measurement Instruments for Data Center market size is expected to reach $ 4243 million by 2032, rising at a market growth of 8.6% CAGR during the forecast period (2026-2032).

Measurement Instruments for Data Center refer to measurement, sensing and monitoring instruments specifically deployed in data center power, environmental and cooling infrastructure to provide quantitative operating data for commissioning, control, energy management, preventive maintenance and fault diagnosis. This study classifies the market by measured parameter into Power and Energy Instrumentation, Temperature and Humidity Instrumentation, Pressure and Differential Pressure Instrumentation, Flow and Thermal Energy Instrumentation, Level Instrumentation, Coolant and Water Quality Instrumentation, Liquid Leak Detection Instrumentation, and Others. Key measurements cover voltage, current, power and energy consumption; room, rack and fluid temperatures; humidity; air and liquid pressure differentials; cooling-water and coolant flow; thermal-energy transfer; tank and reservoir levels; conductivity, pH, turbidity and other coolant-quality parameters; and localized or distributed liquid leakage. These instruments are deployed across electrical distribution systems, air-cooling infrastructure, chilled-water systems and increasingly liquid-cooling loops. Liquid-cooled data centers in particular require coordinated measurement of flow, temperature, pressure and cooling-fluid quality to maintain stable thermal performance and equipment reliability.

Key Findings

Power and energy instrumentation remains a foundational measurement layer

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for data center reliability, capacity utilization and energy management

Rising computing density is increasing the number and granularity of temperature, pressure and cooling-system measurement points

Liquid cooling is creating incremental demand for flow, temperature, pressure, coolant-quality and leak-detection instrumentation

Measurement architectures are shifting from periodic inspection toward distributed, continuously connected monitoring across critical infrastructure

Instrument value is increasingly determined by accuracy, reliability, communication capability and integration with data center operating systems

Market Trends

The Measurement Instruments for Data Center market is moving from relatively independent meters and sensors toward a more distributed and continuously connected measurement architecture. Traditional data centers primarily emphasized electrical power measurement, room temperature and humidity, differential pressure and chilled-water monitoring, while higher rack densities are pushing measurements closer to individual racks, cooling branches and critical equipment. Data center operators increasingly require granular temperature measurement rather than relying on a limited number of room-level sensors, reflecting the greater operational impact of localized thermal conditions. Liquid cooling is accelerating this transition by adding continuous measurement requirements for coolant flow, supply and return temperatures, pressure, water quality and leakage. Official liquid-cooling instrumentation guidance identifies flow, temperature, pressure and cooling-fluid quality as core variables for maintaining efficient and reliable cooling-loop operation. As a result, long-term product development is shifting toward higher measurement density, faster response, greater digital connectivity, easier integration with control systems and more condition-based monitoring.

Market Dynamics

Drivers

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The primary driver for Measurement Instruments for Data Center is the rising economic importance of infrastructure availability and thermal stability. Modern data centers depend on closely coordinated electrical and cooling systems, and abnormal voltage, harmonics, excessive temperature, insufficient flow, pressure imbalance or coolant degradation can reduce equipment reliability or trigger service interruptions. Power-quality monitoring is particularly relevant because nonlinear data center loads can generate harmonic distortion that affects electrical equipment performance. At the same time, increasing computing and rack power density raises the heat load handled by cooling infrastructure, increasing demand for more measurement points and more accurate control of temperature, differential pressure, flow and thermal energy. The transition toward liquid cooling further expands instrumentation intensity because cooling loops require continuous process measurements rather than relying only on room-level environmental parameters.

Restraints

Market development is constrained by long replacement cycles for many industrial instruments, relatively mature measurement technologies in conventional air-cooled facilities and the fragmented nature of data center measurement requirements. Electrical, environmental and cooling applications use different sensor principles, installation methods, accuracy levels and communication protocols, making complete standardization difficult. Measurement devices installed in critical cooling loops must also provide high reliability with minimal maintenance because sensor failure or drift can itself create operating risk. In liquid systems, additional measurement points increase project cost, installation complexity and calibration requirements. Operators must therefore balance measurement granularity against capital expenditure and maintenance workload. Existing facilities may also have legacy control architectures that complicate the integration of newer digital sensors and instruments, slowing retrofit adoption even when more detailed measurement would improve operating visibility.

Opportunities

The strongest structural opportunity is associated with the expansion of high-density computing and liquid cooling. Liquid-cooled data centers require continuous visibility into flow, temperature, pressure and cooling-fluid quality, while water-quality measurement can include conductivity, pH and turbidity to protect cooling loops and maintain stable heat-transfer performance. Leak detection also becomes more important as liquid is distributed closer to information-technology equipment; direct

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sensing cables and point sensors can be complemented by indirect identification through abnormal pressure and flow conditions. These requirements create opportunities not only for standalone instruments but also for compact multi-parameter sensors, digitally connected transmitters, branch-level flow and thermal-energy metering, distributed leak detection and integrated monitoring packages. Retrofit projects represent another opportunity as existing facilities upgrade from coarse facility-level monitoring to rack-, branch- and cooling-loop-level measurement without replacing the entire infrastructure.

Challenges

The principal challenge is maintaining measurement accuracy, stability and interoperability in increasingly complex data center environments. Instruments must perform reliably across different electrical architectures, air- and liquid-cooling systems, coolant chemistries, pipe sizes and operating ranges. The shift toward more measurement points also increases the risk of calibration inconsistency, sensor drift and excessive alarm volumes. Liquid-cooling applications raise additional challenges because coolant chemistry can influence corrosion, deposits and component life, making water-quality measurements operationally significant rather than supplementary. Suppliers must simultaneously improve sensor accuracy, response time, communication capability, compactness and long-term stability while controlling total installed cost. Cybersecurity and communication compatibility become more relevant as instruments increasingly connect to centralized monitoring and control platforms, requiring manufacturers to compete not only in sensing hardware but also in reliable data transmission and system integration.

Industry Chain Analysis

The upstream industry chain for Measurement Instruments for Data Center includes sensing elements, metering integrated circuits, current and voltage measurement components, temperature and humidity sensors, pressure-sensitive elements, flow-sensing components, conductivity and chemical-analysis sensors, leak-detection cables, communication modules, precision electronic components and instrument housings. Cost structures differ significantly by instrument type. Power and energy instrumentation places greater emphasis on measurement accuracy, electrical isolation and signal processing; pressure and flow products depend more heavily on sensing elements, wetted materials and calibration; coolant and water-quality instruments

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require electrodes, optical or electrochemical sensing technologies and fluid compatibility; while liquid leak detection products depend on reliable sensing cables, point detectors and alarm interfaces.

The midstream industry covers sensor integration, instrument design, calibration, firmware development, communication interfaces, assembly, testing and application engineering. Downstream demand comes from data center owners and operators, engineering and construction contractors, cooling-system suppliers, electrical-system suppliers, commissioning companies and maintenance providers. Value creation is shifting toward application-specific integration: individual sensor cost may represent only part of project value, while calibration, installation engineering, communication integration, monitoring configuration and long-term maintenance can materially affect the lifecycle economics of the measurement system. Liquid cooling strengthens this shift because multiple measurement parameters must operate as a coordinated process-instrumentation layer rather than as isolated instruments.

Segment Insights

By measured parameter, Measurement Instruments for Data Center are classified into Power and Energy Instrumentation, Temperature and Humidity Instrumentation, Pressure and Differential Pressure Instrumentation, Flow and Thermal Energy Instrumentation, Level Instrumentation, Coolant and Water Quality Instrumentation, Liquid Leak Detection Instrumentation, and Others. Power and energy instruments serve as a fundamental layer across utility intake, switchgear, backup power, distribution and rack-level systems, supporting load visibility, power quality, capacity management and energy-efficiency analysis. Temperature and humidity instruments remain widely distributed throughout rooms and racks, with growing demand for more granular thermal measurement as heat density increases.

The most significant change in product structure is occurring within cooling-related instrumentation. Pressure and differential pressure measurement supports air distribution, filters, pumps and cooling loops; flow and thermal-energy instrumentation measures coolant circulation and heat removal; level instruments support tanks and reservoirs; coolant and water-quality instruments monitor fluid condition; and leak-detection instruments provide early warning of fluid escape. The increasing use of liquid cooling therefore raises the strategic importance of several previously smaller measurement categories simultaneously rather than shifting demand toward only one instrument type.

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Downstream Market Opportunities

Downstream opportunities are concentrated in hyperscale data centers, high-density computing facilities, third-party colocation sites and existing facilities undergoing power and cooling upgrades. New facilities require broad instrumentation during commissioning and subsequent operation, while expansions and retrofits create demand for more granular measurement of electrical loads and cooling performance. High-density computing is particularly important because increasing thermal loads require closer control of coolant flow, temperature difference, pressure and water quality. Liquid cooling further expands the number of instrumented points around cooling distribution units, primary and secondary loops, manifolds and rack-level cooling circuits, while leakage monitoring becomes more critical as coolant moves closer to electronic equipment. The resulting opportunity extends beyond new data center construction: modernization of existing facilities can generate incremental instrumentation demand as operators add higher-density computing capacity while retaining substantial portions of existing electrical and mechanical infrastructure.

Regional Insights

North America represents a strategically important demand region for Measurement Instruments for Data Center because of extensive hyperscale and high-density computing infrastructure, where power availability and thermal management requirements support sophisticated electrical and cooling measurement. The growing deployment of liquid cooling creates additional demand for flow, temperature, pressure, coolant-quality and leak-detection instrumentation. Europe also represents an important market, with strong emphasis on energy efficiency, reliable facility operation and optimization of cooling infrastructure, supporting demand for power and thermal-energy measurement as well as cooling-process instrumentation. Asia-Pacific combines large-scale new data center construction with expanding local equipment supply chains and therefore offers broad opportunities across both conventional environmental measurement and advanced liquid-cooling instrumentation.

Regional product requirements vary with facility architecture. Markets with larger concentrations of high-density computing are likely to adopt more intensive cooling-loop measurement, while regions with significant new-build activity generate broader demand across power, temperature, humidity, pressure and flow instrumentation.

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Mature markets also provide retrofit opportunities as operators seek more granular measurement and improved energy visibility without replacing entire electrical or cooling systems. Consequently, regional opportunity is increasingly determined not only by data center capacity additions but also by rack density, cooling architecture and the pace of modernization.

Competitive Landscape Analysis

The Measurement Instruments for Data Center market is characterized by a diversified competitive structure because the eight instrument categories rely on substantially different sensing technologies and manufacturing capabilities. Power and energy products compete primarily on electrical measurement accuracy, reliability, power-quality functionality and connectivity; temperature, humidity and pressure instruments emphasize sensor stability, response and distributed deployment; flow and thermal-energy instruments require strong process-measurement capability and fluid-system expertise; coolant and water-quality instruments depend on chemical-analysis performance and long-term sensor stability; and leak-detection products compete on detection sensitivity, location capability and system coverage. As liquid cooling expands, competitive boundaries are gradually shifting because data center operators increasingly require coordinated measurement across flow, temperature, pressure, fluid quality and leakage rather than isolated sensors. This favors suppliers capable of combining reliable instrumentation, digital communication, application engineering and lifecycle support, while specialist manufacturers can maintain differentiated positions in measurement categories where accuracy, calibration expertise or sensing technology creates higher technical barriers.

Report Scope

This report studies the global Measurement Instruments for Data Center demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Measurement Instruments for Data Center, and provides market size (US$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Measurement Instruments for Data Center that contribute to its increasing demand across many markets.

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Highlights and key features of the study

Global Measurement Instruments for Data Center total market, 2021-2032, (USD Million)

Global Measurement Instruments for Data Center total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Measurement Instruments for Data Center total market, key domestic companies, and share, (USD Million)

Global Measurement Instruments for Data Center revenue by player, revenue and market share 2021-2026, (USD Million)

Global Measurement Instruments for Data Center total market by Type, CAGR, 2021-2032, (USD Million)

Global Measurement Instruments for Data Center total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Measurement Instruments for Data Center market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Schneider Electric SE, Siemens AG, ABB Ltd., Eaton Corporation plc, Honeywell International Inc., Emerson Electric Co., Endress+Hauser Group Services AG, Yokogawa Electric Corporation, Vaisala Oyj, WIKA Alexander Wiegand SE & Co. KG, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Measurement Instruments for Data Center market

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Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Measurement Instruments for Data Center Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Measurement Instruments for Data Center Market, Segmentation by Type:

Power and Energy Instrumentation

Temperature and Humidity Instrumentation

Pressure and Differential Pressure Instrumentation

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Flow and Thermal Energy Instrumentation

Level Instrumentation

Coolant and Water Quality Instrumentation

Liquid Leak Detection Instrumentation

Others

Global Measurement Instruments for Data Center Market, Segmentation by Installation:

Electrical Power Distribution Monitoring

White Space Environmental Monitoring

Air Cooling System Monitoring

Facility Water Cooling System Monitoring

Liquid Cooling and CDU Monitoring

Cooling Water and Coolant Quality Monitoring

Leak Detection and Water Management

Global Measurement Instruments for Data Center Market, Segmentation by Technology:

Online Instrumentation

Offline Instrumentation

Global Measurement Instruments for Data Center Market,

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Segmentation by Application:

Colocation Data Centers

Enterprise Data Centers

AI Data Centers

Others

Companies Profiled:

Schneider Electric SE

Siemens AG

ABB Ltd.

Eaton Corporation plc

Honeywell International Inc.

Emerson Electric Co.

Endress+Hauser Group Services AG

Yokogawa Electric Corporation

Vaisala Oyj

WIKA Alexander Wiegand SE & Co. KG

KROHNE Messtechnik GmbH

ifm electronic gmbh

Badger Meter, Inc.

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Christian Bürkert GmbH & Co. KG

Georg Fischer AG

BELIMO Holding AG

Sensirion AG

Kamstrup A/S

ONICON Incorporated

Azbil Corporation

Fuji Electric Co., Ltd.

Socomec

Janitza electronics GmbH

Accuenergy Inc.

Carlo Gavazzi Holding AG

SATEC Ltd.

Electro Industries/GaugeTech

Parameter (RLE Technologies)

TTK

nVent Electric plc

Vertiv Holdings Co

Legrand (Raritan)

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Acrel Co., Ltd.

Jiangsu Sfere Electric Co., Ltd.

Zhuhai Pilot Technology Co., Ltd.

Ablewise China Inc.

Guangdong YADA Electronics Co., Ltd.

Zhuhai Titans Technology Co., Ltd.

CET Electric Technology Inc.

Hangzhou Supmea Automation Technology Co., Ltd.

Key Questions Answered

1. How big is the global Measurement Instruments for Data Center market?
2. What is the demand of the global Measurement Instruments for Data Center market?
3. What is the year over year growth of the global Measurement Instruments for Data Center market?
4. What is the total value of the global Measurement Instruments for Data Center market?
5. Who are the Major Players in the global Measurement Instruments for Data Center market?
6. What are the growth factors driving the market demand?

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