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Global Measurement Instruments for Data Center Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Measurement Instruments for Data Center market size was valued at US$ 2274 million in 2025 and is forecast to a readjusted size of US$ 4243 million by 2032 with a CAGR of 8.6% during review period.

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

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Power and energy instrumentation remains a foundational measurement layer 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

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Drivers

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

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maintain stable heat-transfer performance. Leak detection also becomes more important as liquid is distributed closer to information-technology equipment; direct 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

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and signal processing; pressure and flow products depend more heavily on sensing elements, wetted materials and calibration; coolant and water-quality instruments 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

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measurement categories simultaneously rather than shifting demand toward only one instrument type.

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

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measurement, while regions with significant new-build activity generate broader demand across power, temperature, humidity, pressure and flow instrumentation. 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 is a detailed and comprehensive analysis for global Measurement Instruments for Data Center market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type 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.

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Key Features:

Global Measurement Instruments for Data Center market size and forecasts, in consumption value ($ Million), 2021-2032

Global Measurement Instruments for Data Center market size and forecasts by region and country, in consumption value ($ Million), 2021-2032

Global Measurement Instruments for Data Center market size and forecasts, by Type and by Application, in consumption value ($ Million), 2021-2032

Global Measurement Instruments for Data Center market shares of main players, in revenue ($ Million), 2021-2026

The Primary Objectives in This Report Are:

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

To assess the growth potential for Measurement Instruments for Data Center

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 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.

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Measurement Instruments for Data Center market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segmentation

Market segment by Type

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

Others

Market segment by Installation

Electrical Power Distribution Monitoring

White Space Environmental Monitoring

Air Cooling System Monitoring

Facility Water Cooling System Monitoring

Liquid Cooling and CDU Monitoring

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Cooling Water and Coolant Quality Monitoring

Leak Detection and Water Management

Market segment by Technology

Online Instrumentation

Offline Instrumentation

Market segment by Application

Colocation Data Centers

Enterprise Data Centers

AI Data Centers

Others

Market segment by players, this report covers

Schneider Electric SE

Siemens AG

ABB Ltd.

Eaton Corporation plc

Honeywell International Inc.

Emerson Electric Co.

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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.

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.

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Electro Industries/GaugeTech

Parameter (RLE Technologies)

TTK

nVent Electric plc

Vertiv Holdings Co

Legrand (Raritan)

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.

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

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

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

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South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Measurement Instruments for Data Center product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Measurement Instruments for Data Center, with revenue, gross margin, and global market share of Measurement Instruments for Data Center from 2021 to 2026.

Chapter 3, the Measurement Instruments for Data Center competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026.and Measurement Instruments for Data Center market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Measurement Instruments for Data Center.

Chapter 13, to describe Measurement Instruments for Data Center research findings and conclusion.

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