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US Data Center Renovation Market Opportunity, Growth Drivers, Industry Trend Analysis, and Forecast 2025 - 2034

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Abstracts

U.S. Data Center Renovation Market was valued at USD 8.9 billion in 2024 and is estimated to grow at a CAGR of 18.2% to reach USD 44.7 billion by 2034.

Market growth is driven by the nation’s rapidly expanding digital infrastructure, increasing data traffic, and the need to modernize aging data center facilities to meet high-density computing demands. The transition toward AI workloads, hyperscale cloud adoption, and edge computing requires enhanced power distribution, cooling efficiency, and space optimization. Enterprises are increasingly prioritizing renovation over new construction to reduce costs, accelerate deployment, and comply with emerging energy-efficiency and sustainability regulations. As cyber threats intensify, modernization also includes robust upgrades to security, monitoring, and automation systems to maintain operational continuity in mission-critical environments.

The cooling segment held a 39% share in 2024, driven by the explosive growth of AI and high-density computing workloads. Traditional air-cooling systems are rapidly becoming insufficient as GPU-accelerated servers generate far greater heat loads than conventional IT equipment, with accelerated servers expected to drive nearly 30% annual growth in server electricity consumption, contributing to 70% of server-driven electricity growth between 2025 and 2030

The hyperscale segment will grow at a CAGR of 19.4% through 2034, driven by surging AI workloads, large-scale cloud expansion, and the increasing intensity of compute demands among major cloud and tech service providers. Hyperscale facilities require continuous upgrades to power distribution, cooling systems, and rack infrastructure to sustain unprecedented power densities and operational complexity.

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The Southeast Data Center Renovation Market reached USD 2.35 billion in 2024, supported by its large concentration of enterprise data centers, rising colocation expansions, and strong adoption of cloud and edge infrastructure. States such as Texas, Virginia, Georgia, and Florida are leading renovation activities due to growing power demands, grid modernization efforts, and attractive tax incentives supporting infrastructure upgrades. The region's expanding technology sector, combined with a surge in AI, financial services, and hyperscale operations, continues to drive investment in data center modernization. Additionally, increasing sustainability commitments in the South are fueling the adoption of energy-efficient cooling and electrical systems, positioning the region as a key driver of long-term market growth.

Major companies in the U.S. Data Center Renovation Market include ABB Ltd., AECOM, Caterpillar Inc., Cummins Inc., DPR Construction, Eaton Corporation, Legrand, Schneider Electric, Siemens AG, and Vertiv Group Corp. Companies in the U.S. Data Center Renovation Market are implementing multifaceted strategies to reinforce their presence and meet rising modernization needs. A primary focus is on expanding specialized renovation services, including advanced cooling retrofits, modular power upgrades, and resiliency enhancements that address high-density computing challenges. Firms are integrating AI-enabled monitoring, automation tools, and digital twin modeling to optimize renovation accuracy and reduce downtime. Strategic partnerships with cloud providers, hyperscalers, and construction firms help companies broaden their project pipelines and accelerate deployment capabilities.

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