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Global Data Center Hardware Energy-Saving Retrofit Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Data Center Hardware Energy-Saving Retrofit market size is predicted to grow from US$ 243 million in 2025 to US$ 454 million in 2032; it is expected to grow at a CAGR of 9.5% from 2026 to 2032.

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

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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 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.

United States market for Data Center Hardware Energy-Saving Retrofit is estimated to increase from US$ million in 2025 to US$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for Data Center Hardware Energy-Saving Retrofit is estimated to increase from US$ million in 2025 to US$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for Data Center Hardware Energy-Saving Retrofit is estimated to increase from US$ million in 2025 to US$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key Data Center Hardware Energy-Saving Retrofit players cover Vertiv, Johnson Controls, Santak, Carrier, Carel, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

Report Scope

LPI (LP Information)' newest research report, the “Data Center Hardware Energy-Saving Retrofit Industry Forecast” looks at past sales and reviews total world Data Center Hardware Energy-Saving Retrofit sales in 2025, providing a comprehensive analysis by region and market sector of projected Data Center Hardware Energy-Saving Retrofit sales for 2026 through 2032. With Data Center Hardware Energy-Saving Retrofit sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Data Center Hardware Energy-Saving

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Retrofit industry.

This Insight Report provides a comprehensive analysis of the global Data Center Hardware Energy-Saving Retrofit landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Data Center Hardware Energy-Saving Retrofit portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Data Center Hardware Energy-Saving Retrofit market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Data Center Hardware Energy-Saving Retrofit and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Data Center Hardware Energy-Saving Retrofit.

This report presents a comprehensive overview, market shares, and growth opportunities of Data Center Hardware Energy-Saving Retrofit market by product type, application, key players and key regions and countries.

Market Segmentation

Segmentation by Type:

Ventilation And Air Conditioning System Renovation

Electrical System Renovation

Others

Segmentation by Data Center Type:

Tier 1 Data Center Renovation

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Tier 2 Data Center Renovation

Tier 3 Data Center Renovation

Segmentation by Retrofit Type:

Single System Energy Saving Retrofit

Comprehensive Energy Saving Retrofit

Segmentation by Application:

Small And Medium-Sized Data Centers

Large Data Centers

Ultra-Large Data Centers

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

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- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey
- GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

- Vertiv

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Johnson Controls

Santak

Carrier

Carel

Deerns

Huawei

Runjian

Shanghai Golden Bridge InfoTech

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