

Global High-Density UPS Systems for Liquid-Cooled Data Halls Market Growth 2026-2032

<https://marketpublishers.com/r/G27E3347A922EN.html>

Date: July 2026

Pages: 132

Price: US\$ 3,660.00 (Single User License)

ID: G27E3347A922EN

Abstracts

The global High-Density UPS Systems for Liquid-Cooled Data Halls market size is predicted to grow from US\$ 2592 million in 2025 to US\$ 6366 million in 2032; it is expected to grow at a CAGR of 13.3% from 2026 to 2032.

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.

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 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.

LP Information, Inc. (LPI) ' newest research report, the "High-Density UPS Systems for Liquid-Cooled Data Halls Industry Forecast" looks at past sales and reviews total world High-Density UPS Systems for Liquid-Cooled Data Halls sales in 2025, providing a comprehensive analysis by region and market sector of projected High-Density UPS Systems for Liquid-Cooled Data Halls sales for 2026 through 2032. With High-Density UPS Systems for Liquid-Cooled Data Halls sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world High-Density UPS Systems for Liquid-Cooled Data Halls industry.

This Insight Report provides a comprehensive analysis of the global High-Density UPS Systems for Liquid-Cooled Data Halls landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on High-Density UPS Systems for Liquid-Cooled Data Halls portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global High-Density UPS Systems for Liquid-Cooled Data Halls market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for High-Density UPS Systems for Liquid-Cooled Data Halls and breaks down the forecast by Product Architecture, 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 High-Density UPS Systems for Liquid-Cooled Data Halls.

This report presents a comprehensive overview, market shares, and growth opportunities of High-Density UPS Systems for Liquid-Cooled Data Halls market by product type, application, key manufacturers and key regions and countries.

Segmentation by Product Architecture:

Modular UPS

Monolithic High-Power UPS

Scalable UPS System

Other

Segmentation by Power Rating:

200?500 kVA

501?1200 kVA

Above 1200 kVA

Other

Segmentation by Energy Storage Compatibility:

VRLA-Compatible UPS

Lithium-ion-Ready UPS

Flywheel-Integrated UPS

Other

Segmentation by Application:

AI Training Data Centers

AI Inference / Cloud Data Centers

Colocation Data Centers

Enterprise / Government Critical Data Halls

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

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 analysing the company's coverage, product portfolio, its market penetration.

Schneider Electric

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

Key Questions Addressed in this Report

What is the 10-year outlook for the global High-Density UPS Systems for Liquid-Cooled Data Halls market?

What factors are driving High-Density UPS Systems for Liquid-Cooled Data Halls market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do High-Density UPS Systems for Liquid-Cooled Data Halls market opportunities vary by end market size?

How does High-Density UPS Systems for Liquid-Cooled Data Halls break out by Product Architecture, by Application?

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