

Data Center Renovation Market Outlook 2025-2034: Market Share, and Growth Analysis By Product (Cooling, Power, IT Racks and Enclosures, Networking equipment, DCIM, Other Products), By Organization Size (Small Size Organization, Medium Size Organization, Large Size Organization), By Application

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Abstracts

The Data Center Renovation Market is valued at USD 32.6 billion in 2025 and is projected to grow at a CAGR of 19.6% to reach USD 162.9 billion by 2034. The data center renovation market has become increasingly relevant as organizations strive to modernize existing facilities to meet evolving performance, efficiency, and sustainability requirements. Rather than constructing entirely new data centers, many enterprises and service providers are opting to renovate their current infrastructure, which involves upgrading power and cooling systems, improving cabling and airflow management, and incorporating the latest in server and networking technologies. This approach helps data centers extend their operational life, reduce costs, and adapt to changing workloads without the need for a full-scale rebuild. The market experienced a rise in projects focused on energy efficiency and sustainability. Operators invested in advanced cooling technologies, such as liquid cooling and heat reclamation systems, to lower energy consumption and meet stricter environmental standards. Additionally, renovations often included the replacement of legacy equipment with modern, high-performance servers and storage solutions, enabling data centers to handle increasing workloads more effectively. Renovation service providers also introduced new tools and methodologies to minimize downtime during the upgrade process, ensuring that critical operations remained uninterrupted. These developments highlighted the importance of strategic renovations in helping data centers stay competitive and cost-efficient. Looking ahead,

the data center renovation market is expected to expand steadily as enterprises prioritize sustainability and efficiency over building new facilities. The growing adoption of edge computing, hybrid IT environments, and high-density workloads will drive demand for renovations that enhance scalability and operational resilience. Advances in AI-driven monitoring and predictive maintenance tools will further support renovation efforts, allowing operators to identify and address potential issues before they impact performance. With these ongoing developments, the data center renovation market is set to remain a key component of the broader data center ecosystem, ensuring that older facilities can adapt to the demands of a rapidly changing digital landscape.

Key Insights Data Center Renovation Market

Increased focus on energy-efficient and sustainable upgrades during renovations.

Adoption of advanced cooling technologies, such as liquid cooling and heat reclamation systems.

Replacement of legacy hardware with modern, high-performance equipment.

Development of methodologies that minimize downtime during renovation projects.

Growing use of AI and predictive maintenance tools to support renovation efforts.

Rising demand for more efficient and sustainable data center operations.

Need to extend the lifespan of existing facilities and defer the cost of new construction.

Increasing workloads and evolving IT requirements prompting the need for infrastructure upgrades.

Regulatory pressures and environmental standards encouraging modernization of older data centers.

High upfront costs and complexity of large-scale renovation projects.

Difficulty in maintaining uninterrupted operations during facility upgrades.

Ensuring compatibility of new technologies with legacy infrastructure.

Data Center Renovation Market Segmentation

By Product

Cooling

Power

IT Racks and Enclosures

Networking equipment

DCIM

Other Products

By Organization Size

Small Size Organization

Medium Size Organization

Large Size Organization

By Application

BFSI

IT and Telecom

Manufacturing

Government

Healthcare

Other Applications

Key Companies Analysed

APL Data Center

IBM Corporation

Cisco Systems Inc.

Schneider Electric SE

Hewlett Packard Enterprise Company

ABB Ltd.

Eiffage Énergie SAS

Eaton Corporation plc

Turner Construction Co.

AECOM

Gilbane Building Company Inc.

JE Dunn Construction Group Inc.

Hensel Phelps Construction Co. Inc.

DPR Construction Inc.

HITT Contracting Inc.

Black & Veatch Holding Company

SAS Institute Inc.

MA Mortenson Company Inc.

Panduit Corporation

CyrusOne Inc.

Nabholz Corporation

Fortis Construction Inc.

Clune Construction Company

L.P.

Cap Ingelec SAS

Raritan Inc.

Submer Technologies

Sunbird Software Inc.

Gilford Corporation

Fujitsu Limited

NTT Global Data Centers Corp.

Vertiv Holdings Co.

Data Center Renovation Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modeling, to assess supply–demand dynamics. Cross-sector

influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends.

Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behavior are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

Data Center Renovation Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption.

Regional insights highlight the most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

Countries Covered

North America — Data Center Renovation market data and outlook to 2034

United States

Canada

Mexico

Europe — Data Center Renovation market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — Data Center Renovation market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — Data Center Renovation market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — Data Center Renovation market data and outlook to 2034

Brazil

Argentina

Chile

Peru

** We can include data and analysis of additional countries on demand.*

Research Methodology

This study combines primary inputs from industry experts across the Data Center Renovation value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

Key Questions Addressed

What is the current and forecast market size of the Data Center Renovation industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

Your Key Takeaways from the Data Center Renovation Market Report

Global Data Center Renovation market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on Data Center Renovation trade, costs, and supply chains

Data Center Renovation market size, share, and outlook across 5 regions and 27 countries, 2023-2034

Data Center Renovation market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term Data Center Renovation market trends, drivers, restraints, and opportunities

Porter’s Five Forces analysis, technological developments, and Data Center Renovation supply chain analysis

Data Center Renovation trade analysis, Data Center Renovation market price analysis, and Data Center Renovation supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest Data Center Renovation market news and developments

Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

** The updated report will be delivered within 3 working days*

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