

Data Center Electrical Retrofit Market Forecasts to 2034 – Global Analysis By Retrofit Type (Power System Upgrades, Cooling & Electrical System Integration, Lighting & Energy Efficiency Upgrades and Other Retrofit Types), Component, Data Center Type, Deployment Mode, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Data Center Electrical Retrofit Market is accounted for \$33.90 billion in 2026 and is expected to reach \$111.17 billion by 2034 growing at a CAGR of 16% during the forecast period. A data center electrical retrofit refers to the process of upgrading, modifying, or modernizing existing electrical infrastructure within an operational data center to improve performance, safety, reliability, and energy efficiency. This includes enhancements to power distribution systems, switchgear, UPS units, transformers, grounding, and monitoring solutions without fully rebuilding the facility. Electrical retrofits are typically undertaken to support higher power densities, integrate renewable or backup power sources, ensure regulatory compliance, reduce downtime risks, and optimize energy consumption. Such retrofitting enables legacy data centers to meet evolving IT loads, sustainability targets, and resilience requirements while extending the facility's operational lifespan.

Market Dynamics:

Driver:

Rising IT workloads requiring power optimization

Growth in cloud computing, AI, and IoT intensifies the need for resilient electrical

systems. Retrofit solutions enable efficient distribution, monitoring, and optimization of power infrastructure. Vendors are embedding intelligent sensors and automation frameworks to enhance scalability. Enterprises across BFSI, telecom, and manufacturing are adopting retrofit projects to safeguard mission-critical operations. Rising workloads are ultimately amplifying demand, positioning electrical retrofits as a backbone of modern data centers.

Restraint:

Disruption risks to ongoing data operations

Retrofitting requires integration with live systems, increasing the risk of downtime. Complex transitions slow deployment and raise operational costs. Smaller enterprises are disproportionately affected by disruption risks. Vendors must invest in modular and phased approaches to minimize interruptions. Persistent risks are ultimately restricting scalability and slowing adoption of retrofit solutions.

Opportunity:

Growth in edge computing retrofit projects

Edge facilities require compact and efficient retrofit solutions to support low-latency services. Vendors are embedding AI-driven monitoring into retrofit frameworks to broaden adoption. Enterprises leverage retrofits to align infrastructure with IoT, AR/VR, and autonomous systems. Growth in edge computing is expanding across industries such as retail, logistics, and manufacturing. Rising demand for edge retrofits is ultimately strengthening market expansion by positioning electrical retrofits as enablers of distributed intelligence.

Threat:

Regulatory compliance variability across regions

Operators struggle to align retrofit projects with diverse efficiency mandates and safety codes. Frequent updates increase costs and disrupt operational continuity. Vendors must invest heavily in compliance frameworks to remain competitive. Smaller providers find it difficult to adapt to rapid shifts in regulatory requirements. Persistent variability is ultimately constraining adoption and slowing overall market growth.

Covid-19 Impact:

The Covid-19 pandemic reshaped the Data Center Electrical Retrofit Market by accelerating digital transformation and intensifying reliance on resilient infrastructure. Remote work and surging online activity placed unprecedented strain on data centers. Operators invested in retrofit projects to maintain service continuity and safeguard operations. Budget constraints initially slowed adoption in cost-sensitive industries. The pandemic ultimately reinforced the strategic importance of electrical retrofits as catalysts for operational resilience.

The power system upgrades segment is expected to be the largest during the forecast period

The power system upgrades segment is expected to account for the largest market share during the forecast period, reinforced by rising demand for durable and efficient power management. Platforms unify diverse electrical functions to provide holistic reliability. Operators embed upgrades into mission-critical applications to strengthen resilience. Vendors are offering cloud-integrated monitoring frameworks to broaden accessibility. Adoption across global enterprises is consolidating leadership. Power system upgrades are ultimately strengthening dominance by forming the foundation of retrofit services.

The partial retrofit segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the partial retrofit segment is predicted to witness the highest growth rate, supported by demand for cost-efficient and flexible solutions. Partial retrofits allow operators to upgrade specific systems without full-scale replacement. Enterprises deploy partial retrofits to minimize disruption and optimize budgets. Vendors are embedding modular designs to enhance scalability. Adoption across SMEs and distributed facilities is expanding rapidly. Partial retrofits are ultimately fueling growth by strengthening demand for adaptable retrofit solutions.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, anchored by mature data center ecosystems and strong enterprise adoption of retrofit solutions. The United States leads with significant investments in hyperscale facilities, cloud infrastructure, and AI-driven operations. Canada

complements growth with compliance-driven initiatives and government-backed digital programs. Presence of major technology providers consolidates regional leadership. Rising demand for sustainability and regulatory compliance is shaping adoption across industries.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR supported by rapid digitalization and expanding data center ecosystems. China is investing heavily in hyperscale facilities and advanced retrofit infrastructure. India is fostering growth through government-backed digitization programs and fintech expansion. Japan and South Korea are advancing adoption with strong emphasis on automation and enterprise resilience. Telecom, BFSI, and manufacturing sectors across the region are driving demand for intelligent retrofit platforms.

Key players in the market

Some of the key players in Data Center Electrical Retrofit Market include Schneider Electric SE, Eaton Corporation plc, ABB Ltd., Siemens AG, Vertiv Holdings Co., Huawei Technologies Co., Ltd., Delta Electronics, Inc., Toshiba Corporation, Mitsubishi Electric Corporation, Emerson Electric Co., Legrand S.A., Fuji Electric Co., Ltd., Socomec Group S.A., Johnson Controls International plc and General Electric Company.

Key Developments:

In July 2024, Vertiv completed the acquisition of CoolTera Ltd., a specialist in high-density liquid cooling solutions, directly enhancing its retrofit portfolio to address the critical cooling and power challenges of upgrading existing facilities for AI and advanced computing workloads.

In October 2023, ABB announced a global partnership with Dell Technologies to integrate its data center infrastructure management (DCIM) solutions, ABB Ability™ Data Center Automation and Ability™ Power Distribution, with Dell's IT management platforms. This collaboration aims to provide a unified view of IT and facility operations, enabling more efficient retrofits and optimization of existing data center infrastructure.

Retrofit Types Covered:

Power System Upgrades

Cooling & Electrical System Integration

Lighting & Energy Efficiency Upgrades

UPS & Battery System Upgrades

Other Retrofit Types

Components Covered:

Switchgear & Panels

Uninterruptible Power Supplies (UPS)

Power Distribution Units (PDU)

Cables & Wiring

Monitoring & Control Systems

Other Components

Data Center Types Covered:

Hyperscale Data Centers

Colocation Data Centers

Enterprise Data Centers

Edge & Micro Data Centers

Other Data Center Types

Deployment Modes Covered:

Partial Retrofit

Full Retrofit

End Users Covered:

IT & Telecom

BFSI (Banking & Financial Services)

Healthcare

Government & Defense

Energy & Utilities

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2028, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

Contents

1 EXECUTIVE SUMMARY

2 PREFACE

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
 - 2.4.1 Data Mining
 - 2.4.2 Data Analysis
 - 2.4.3 Data Validation
 - 2.4.4 Research Approach
- 2.5 Research Sources
 - 2.5.1 Primary Research Sources
 - 2.5.2 Secondary Research Sources
 - 2.5.3 Assumptions

3 MARKET TREND ANALYSIS

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 End User Analysis
- 3.7 Emerging Markets
- 3.8 Impact of Covid-19

4 PORTERS FIVE FORCE ANALYSIS

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

5 GLOBAL DATA CENTER ELECTRICAL RETROFIT MARKET, BY RETROFIT

TYPE

- 5.1 Introduction
- 5.2 Power System Upgrades
- 5.3 Cooling & Electrical System Integration
- 5.4 Lighting & Energy Efficiency Upgrades
- 5.5 UPS & Battery System Upgrades
- 5.6 Other Retrofit Types

6 GLOBAL DATA CENTER ELECTRICAL RETROFIT MARKET, BY COMPONENT

- 6.1 Introduction
- 6.2 Switchgear & Panels
- 6.3 Uninterruptible Power Supplies (UPS)
- 6.4 Power Distribution Units (PDU)
- 6.5 Cables & Wiring
- 6.6 Monitoring & Control Systems
- 6.7 Other Components

7 GLOBAL DATA CENTER ELECTRICAL RETROFIT MARKET, BY DATA CENTER TYPE

- 7.1 Introduction
- 7.2 Hyperscale Data Centers
- 7.3 Colocation Data Centers
- 7.4 Enterprise Data Centers
- 7.5 Edge & Micro Data Centers
- 7.6 Other Data Center Types

8 GLOBAL DATA CENTER ELECTRICAL RETROFIT MARKET, BY DEPLOYMENT MODE

- 8.1 Introduction
- 8.2 Partial Retrofit
- 8.3 Full Retrofit

9 GLOBAL DATA CENTER ELECTRICAL RETROFIT MARKET, BY END USER

- 9.1 Introduction

- 9.2 IT & Telecom
- 9.3 BFSI (Banking & Financial Services)
- 9.4 Healthcare
- 9.5 Government & Defense
- 9.6 Energy & Utilities
- 9.7 Other End Users

10 GLOBAL DATA CENTER ELECTRICAL RETROFIT MARKET, BY GEOGRAPHY

- 10.1 Introduction
- 10.2 North America
 - 10.2.1 US
 - 10.2.2 Canada
 - 10.2.3 Mexico
- 10.3 Europe
 - 10.3.1 Germany
 - 10.3.2 UK
 - 10.3.3 Italy
 - 10.3.4 France
 - 10.3.5 Spain
 - 10.3.6 Rest of Europe
- 10.4 Asia Pacific
 - 10.4.1 Japan
 - 10.4.2 China
 - 10.4.3 India
 - 10.4.4 Australia
 - 10.4.5 New Zealand
 - 10.4.6 South Korea
 - 10.4.7 Rest of Asia Pacific
- 10.5 South America
 - 10.5.1 Argentina
 - 10.5.2 Brazil
 - 10.5.3 Chile
 - 10.5.4 Rest of South America
- 10.6 Middle East & Africa
 - 10.6.1 Saudi Arabia
 - 10.6.2 UAE
 - 10.6.3 Qatar
 - 10.6.4 South Africa

10.6.5 Rest of Middle East & Africa

11 KEY DEVELOPMENTS

11.1 Agreements, Partnerships, Collaborations and Joint Ventures

11.2 Acquisitions & Mergers

11.3 New Product Launch

11.4 Expansions

11.5 Other Key Strategies

12 COMPANY PROFILING

12.1 Schneider Electric SE

12.2 Eaton Corporation plc

12.3 ABB Ltd.

12.4 Siemens AG

12.5 Vertiv Holdings Co.

12.6 Huawei Technologies Co. Ltd.

12.7 Delta Electronics, Inc.

12.8 Toshiba Corporation

12.9 Mitsubishi Electric Corporation

12.10 Emerson Electric Co.

12.11 Legrand S.A.

12.12 Fuji Electric Co., Ltd.

12.13 Socomec Group S.A.

12.14 Johnson Controls International plc

12.15 General Electric Company

List Of Tables

LIST OF TABLES

Table 1 Global Data Center Electrical Retrofit Market Outlook, By Region (2025-2034) (\$MN)

Table 2 Global Data Center Electrical Retrofit Market Outlook, By Retrofit Type (2025-2034) (\$MN)

Table 3 Global Data Center Electrical Retrofit Market Outlook, By Power System Upgrades (2025-2034) (\$MN)

Table 4 Global Data Center Electrical Retrofit Market Outlook, By Cooling & Electrical System Integration (2025-2034) (\$MN)

Table 5 Global Data Center Electrical Retrofit Market Outlook, By Lighting & Energy Efficiency Upgrades (2025-2034) (\$MN)

Table 6 Global Data Center Electrical Retrofit Market Outlook, By UPS & Battery System Upgrades (2025-2034) (\$MN)

Table 7 Global Data Center Electrical Retrofit Market Outlook, By Other Retrofit Types (2025-2034) (\$MN)

Table 8 Global Data Center Electrical Retrofit Market Outlook, By Component (2025-2034) (\$MN)

Table 9 Global Data Center Electrical Retrofit Market Outlook, By Switchgear & Panels (2025-2034) (\$MN)

Table 10 Global Data Center Electrical Retrofit Market Outlook, By Uninterruptible Power Supplies (UPS) (2025-2034) (\$MN)

Table 11 Global Data Center Electrical Retrofit Market Outlook, By Power Distribution Units (PDU) (2025-2034) (\$MN)

Table 12 Global Data Center Electrical Retrofit Market Outlook, By Cables & Wiring (2025-2034) (\$MN)

Table 13 Global Data Center Electrical Retrofit Market Outlook, By Monitoring & Control Systems (2025-2034) (\$MN)

Table 14 Global Data Center Electrical Retrofit Market Outlook, By Other Components (2025-2034) (\$MN)

Table 15 Global Data Center Electrical Retrofit Market Outlook, By Data Center Type (2025-2034) (\$MN)

Table 16 Global Data Center Electrical Retrofit Market Outlook, By Hyperscale Data Centers (2025-2034) (\$MN)

Table 17 Global Data Center Electrical Retrofit Market Outlook, By Colocation Data Centers (2025-2034) (\$MN)

Table 18 Global Data Center Electrical Retrofit Market Outlook, By Enterprise Data

Centers (2025-2034) (\$MN)

Table 19 Global Data Center Electrical Retrofit Market Outlook, By Edge & Micro Data Centers (2025-2034) (\$MN)

Table 20 Global Data Center Electrical Retrofit Market Outlook, By Other Data Center Types (2025-2034) (\$MN)

Table 21 Global Data Center Electrical Retrofit Market Outlook, By Deployment Mode (2025-2034) (\$MN)

Table 22 Global Data Center Electrical Retrofit Market Outlook, By Partial Retrofit (2025-2034) (\$MN)

Table 23 Global Data Center Electrical Retrofit Market Outlook, By Full Retrofit (2025-2034) (\$MN)

Table 24 Global Data Center Electrical Retrofit Market Outlook, By End User (2025-2034) (\$MN)

Table 25 Global Data Center Electrical Retrofit Market Outlook, By IT & Telecom (2025-2034) (\$MN)

Table 26 Global Data Center Electrical Retrofit Market Outlook, By BFSI (Banking & Financial Services) (2025-2034) (\$MN)

Table 27 Global Data Center Electrical Retrofit Market Outlook, By Healthcare (2025-2034) (\$MN)

Table 28 Global Data Center Electrical Retrofit Market Outlook, By Government & Defense (2025-2034) (\$MN)

Table 29 Global Data Center Electrical Retrofit Market Outlook, By Energy & Utilities (2025-2034) (\$MN)

Table 30 Global Data Center Electrical Retrofit Market Outlook, By Other End Users (2025-2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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