

Data Center Construction Market in Americas - Industry Outlook and Forecast 2018-2023

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Abstracts

This market research report on data center construction market in Americas offers analysis on market size & forecast, market share, industry trends, growth drivers, and vendor analysis. The market study also includes insights on segmentation by type (building development, installation and commissioning services, design, security, and DCIM), by tier standard (Tier 1 and Tier 2, Tier 3, and Tier 4), and by geography (North America and Latin America).

Data Center Construction Market in Americas - Overview

The rapid technological advancement such as adoption of cloud-based service, big data analytics, and IoT is augmenting the development of additional data centers and is driving the growth of the data center construction market in Americas. The US contributes over 85% of the investments in American data center construction market. The economic development and technological innovations in Canada and Latin America will create lucrative opportunities for key players in the data center construction market in Americas during the forecast period. The top markets for data center construction in the US include regions of Virginia, Texas, California, New York, North Carolina, and Illinois. BSFI and technology sectors are creating the highest demand for data center construction in the American market. Additionally, colocation and hyperscale data center operators are expected to invest billions in the construction of new data center facilities over the next few years.

The increasing focus on reducing power consumption and carbon emission are encouraging data center operators to construct energy-efficient infrastructure and install innovative monitoring and management solutions to meet the growing demand in the market. Companies such as Equinix, Digital Realty, DuPont Fabros, Facebook,

CyrusOne, and Switch are major revenue contributors in the American data center construction market. The data center construction market in Americas is anticipated to generate revenues of over \$3.5 billion in 2023 and is projected to grow at a CAGR of close to 5% during the forecast period.

Data Center Construction Market in Americas - Dynamics

The market for data center is growing significantly across Americas. The US leads the market with increased construction of data centers spanning thousands of square feet in area across acres of land. A multi-million project can result in millions of revenues for the market participants that include contractors, sub-contractors, architectural and engineering firms, physical security and DCIM providers. The site selection is one of the important criteria for developing data centers across the globe and it includes factors such as land stability, power availability, presence of free cooling options, tax incentives, carrier availability, cost factors, and data demand. The growing investment in mega data center projects will augment the growth of the data center construction market in Americas. Additionally, the location also plays a vital role in determining the availability of local workforce to operate in these new data centers. The growth of the construction market will aid in creation of hundreds of local construction and operation jobs.

Data Center Construction Market in Americas Segmentation

This market research report includes a detailed segmentation of the market by type, tier standard, and geography.

Segmentation of Data Center Construction Market in Americas

Data Center Construction Market in Americas – By Type

Greenfield and brownfield developments will attribute to the revenues in the data center construction market in Americas

The data center construction market in Americas by type is segmented into building development, installation and commissioning services, design, physical security, and DCIM. Building development is the largest segment of the market generating revenues of more than \$1.6 billion in 2023 and growing at a CAGR of more than 3% during the forecast period. The classification of building development in data center construction includes greenfield and brownfield developments. The increasing focus on building

modern facilities that can withstand earthquakes and floods is driving the growth of this market segment in the American data center market. The greenfield development projects are expected to grow during the forecast period due to the installation of renewable energy sources such as wind and solar power for data center operations. The demand for modular data centers with renewable energy sources will augment the growth of the building development segment in the data center construction market in Americas.

Data Center Construction Market in Americas – By Tier Standard

Tier 3 data center contribution to overall revenue will be high, where the cost can vary from \$600-\$800.

The tier standard segment in the data center construction market in Americas is classified into Tier 1 and Tier 2, Tier 3, and Tier 4. The Tier 3 segment will dominate the market generating revenues of more than \$1.7 billion by 2023 and is expected to grow at a CAGR of close to 6% during the forecast period. More than 65 data center under construction in the American market fall in the Tier 3 standard. The increasing number of greenfield development construction projects in Latin America is boosting the growth of the Tier 3 standard in the market. The growing development of the Tier 3 data center will increase the adoption of four-layer security and DCIM in the region. Moreover, the development of sustainable designs that reduce power consumption and carbon footprint will also drive the growth of this market segment in the coming years.

Data Center Construction Market in Americas – By Geography

Construction of mega data centers in North Americas will boost the growth of data center construction market in Americas

The data center construction market in Americas by geography is divided into North America and Latin America. North America dominates the market generating revenues of over \$3.2 billion by 2023 and is anticipated to grow at a CAGR of more than 4% during the forecast period. The rising demand for cloud computing, big data, and Internet of Things (IoT) services is driving the growth of the data center construction market in North America. The increasing number of modular and edge data centers in major cities across the US and Canada will attribute to the growth of the North American region in the data center construction market. The growing adoption of 2N power infrastructure and free-cooling techniques will create new opportunities for leading vendors in the data construction market during the forecast period.

KEY COUNTRIES PROFILED

The key countries profiled in the report are:

US

Canada

Brazil

Colombia

Chile

Key Vendor Analysis

The data center construction market in Americas is highly competitive due to the presence of many players. The increased presence of construction contractors, architectural and engineering firms, physical security vendors and DCIM solutions providers will intensify the competitiveness in the market. The development of edge data center facilities will create lucrative opportunities for data center construction vendors in the American market during the forecast period. The growing construction of greenfield data center projects in Tier 2 market in Americas will add to the revenue for local construction contractors. Construction contractors are also partnering with infrastructure vendors to offer modular data center solutions to create new revenue opportunities.

The major vendors in the market are:

Key Construction Contractors

Turner Construction

Holder Construction

DPR Construction

Jacobs Engineering

Corgan

AECOM

Syska Hennessy Group

Aceco TI

Key Physical Security and DCIM Providers

ABB

Assa Abloy

Bosch Security Systems (Robert Bosch)

Honeywell International

Nlyte Software

Schneider Electric

Siemens

SimplexGrinnell (Tyco International)

Sunbird Software

Vertiv

Other prominent vendors include Clune Construction, Fluor Corporation, FM Engineering, Fortis Construction, Gensler, Gilbane Building Co., HDR, Hensel Phelps, HITT Contracting, Hoffman Construction, Je Dunn Construction, Morrison Hershfield, Mortenson Construction, Structure Tone, Whiting-Turner Contracting Co, ZFB Group, Flex Enclosure, Allegion, Axis Communication, Cisco, Cormant, Digitus-Biometrics, Eaton, EMKA Group, FNT, Geist: Environet, Hangzhou Hikvision Digital Technology,

Intel DCM, Modius, Optimum Path: Visual Data Center, Panduit, Rackwise, and Vigilent.

Key market insights include

1. The analysis of data center construction market in America provides market size and growth rate for the forecast period 2018-2023.
2. It offers comprehensive insights on current industry trends, trend forecast, and growth drivers about the data center construction market in America.
3. The report provides the latest analysis of market share, growth drivers, challenges, and investment opportunities.
4. It offers a complete overview of market segments and the regional outlook for data center construction market in America.
5. The report offers a detailed overview of the vendor landscape, competitive analysis, and key market strategies to gain competitive advantage.

According to the latest industry analysis by Arizton, the data center construction market in America size is expected to reach over \$3.5 billion by 2023, growing at a CAGR of close to 5% 2017–2023. The market research report provides in-depth market analysis and segmental analysis of the data center construction market in America by type, tier standard, and geography.

Base Year: 2017

Forecast Year: 2018–2023

The study considers the present scenario of the Data Center Construction Market in Americas and its market dynamics for the period 2018–2023. The study covers a detailed overview of various market growth enablers, restraints, and trends. The study covers both the demand and supply sides of the market. The study also profiles and analyzes the leading companies and other prominent companies operating in the market.

Major Vendors in the Data Center Construction Market in Americas

Key Construction Contractors

Turner Construction
Overview

Service Offerings

Holder Construction

DPR Construction

Jacobs Engineering

Corgan

AECOM

Syska Hennessy Group

Aceco TI

Key Physical Security and DCIM Providers

ABB

Assa Abloy

Bosch Security Systems (Robert Bosch)

Honeywell International

Nlyte Software

Schneider Electric

Siemens

SimplexGrinnell (Tyco International)

Sunbird Software

Vertiv

Prominent Players in the Data Center Market in Americas

Key Construction Contractors

Clune Construction

§ Service Offerings

Fluor Corporation

FM Engineering

Fortis Construction

Gensler

Gilbane Building Co.

HDR

Hensel Phelps

HITT Contracting

Hoffman Construction

Je Dunn Construction

Morrison Hershfield

Mortenson Construction

Structure Tone

Whiting-Turner Contracting Co

ZFB Group

Flex Enclosure

Key Physical Security and DCIM Providers

Allegion

Axis Communication

Cisco

Cormant

Digitus-Biometrics

Eaton

EMKA Group

FNT

Geist: Environet

Hangzhou Hikvision Digital Technology

Intel DCM

Modius

Optimum Path: Visual Data Center

Panduit

Rackwise

Vigilent

Market Segmentation by Type

Building Development

Installation and Commissioning Services

Design

Security

DCIM

Market Segmentation by Tier Standard

Tier 1 and Tier 2

Tier 3

Tier 4

Market Segmentation by Geography

North America

US

Canada

Latin America

Brazil

Colombia

Chile

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