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Data Center Construction Market in US - Industry Outlook and Forecast 2019-2024

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Abstracts

The US data center construction market is projected to generate revenues of around $12 billion by 2024.

The increased demand for closed-based services, the increased investment from colocation providers, the rise in edge data center computing, favorable tax incentives, and the growth of automation and artificial intelligence in data centers are a few major drivers in the US data center construction market. The procurement of renewable energy sources and the implementation of Energy Star certified products is driving the US data center construction market. The market is likely to witness many brownfield constructions, especially in the North-Eastern US. The increasing vigilance of the infrastructure is driving vendors toward end-to-end facility automation, which is expected to affect the US data center construction market significantly. The US data center construction market is witnessing high investment from colocation and cloud hosting service and hyperscale data center operators.

The US data center construction market is adopting innovative solutions such as multipurpose cooling systems and modular infrastructure solutions, which are expected to drive the US data center construction market. The market is migrating toward the adoption of over 42U racks - 45U, 47U, and 48U. The adoption of Lithium-ion batteries, fuel cell technology, natural gas generators, intelligent PDUs, and high voltage switchgear is expected to increase the competition in the market among electrical infrastructure vendors. Further, the direct liquid cooling and immersion cooling market is expected to become competitive as the adoption of HPC infrastructure among data centers is growing in the US. Initiatives such as Open Commute Projects are expected to bring several new cooling techniques and technologies to the market, thereby increasing the competition among mechanical infrastructure vendors.

This market research report on US data center construction market covers market sizing and forecast, market share, industry trends, growth drivers, and vendor analysis. The market study includes insights on segmentation by infrastructure (electrical (UPS systems, generators, transfer switches & switchgears, rack PDUs, and others) and mechanical type (cooling systems, racks, and others), general construction (building development, installation and commissioning services, building design, physical security, and DCIM), facility size (small data centers, medium data centers, and hyperscale data centers), tier standards (Tier I and Tier II, Tier III, and Tier IV), and geography (South Eastern US, South Western US, Mid-Western US, Western US, and North Eastern US).

The study considers the present scenario of the US data center construction market and its market dynamics for the period 2018?2024. It covers a detailed overview of several market growth enablers, restraints, and trends. The study offers both the demand and supply aspect of the US data center construction market. It also profiles and examines leading vendors and other prominent vendors operating in the US data center construction market.

US Data Center Construction Market: Segmentation

This market research report includes detailed market segmentation by infrastructure, general construction, facility size, tier standards, and geography. The US data center construction market by electrical infrastructure comprises UPS (uninterrupted power supply) systems, generators, transfer switches & switchgears, rack PDUs, other electrical infrastructure. The UPS system segment dominated the market size in 2018 and is expected to grow at a CAGR of around 1.3% during the forecast period. The increased adoption of lithium-ion and Nickel-Zinc UPS systems is expected to boost the data center UPS market in the US.

The market is also witnessing the growth in generators powered by fuel cells to reduce carbon emission. The growing interest in green data centers to reduce the efficiency of data centers is driving the demand for intelligent racks PDUs in the market. Vendors are offering PDUs in a variety of colors for identification purposes.

The mechanical construction segment in the data center construction market is categorized into cooling systems, racks, and others. The cooling system segment accounted for the largest market, share in 2018. The extensive use of indirect evaporative coolers, air or water-side economizers, and free cooling chillers is driving the market.

The US data center construction market by general construction is classified into building development, installation and commissioning services, building design, physical security, and DCIM. The growing number of brownfield, Greenfield, and modular facilities projects with the installation of on-site renewable power sources such as wind and solar energy is likely to continue in the market over the next few years. Further, infrastructure vendors are increasingly partnering with major contractors to increase the revenue share.

Air-based and liquid-based cooling technique are the two major cooling systems available in the US data center construction market. Free cooling solutions are gaining more popularity than liquid-based cooling solutions. However, the use of chilled water systems is still highly prevalent in the market, particularly in the Northern US.

CRAC & CRAH units work in conjunction with other cooling units such as chillers, cooling towers, dry coolers, and condensers. There is a growing demand for both CRACs and CRAHs units in the data center to increase efficiency and productivity in the IT infrastructure. The South Eastern and the Mid-Western US are majorly adopting CRAH units. The construction of mega and hyperscale facilities is a driving factor for the increased adoption of both CRAC and CRAH units with 2N redundant configuration.

The hyperscale segment dominated the US data center construction market in 2018 and is expected to grow steadily during the forecast period. The South Eastern US and the Western US witnessed the highest investment from investors in the hyperscale data center facilities.

The Tier III standard segment accounted for the highest market size in 2018, which is expected to grow at a CAGR of over 1% during the forecast period. The need for tier III certification from the Uptime Institute to attract customers and increase the occupancy rate will boost the growth of this segment in the US market.

Market Segmentation by Infrastructure

- Electrical Infrastructure
- Mechanical Infrastructure
- General Construction

Market Segmentation by Electrical Type

UPS systems

Generators

Transfer Switches & Switchgears

Rack PDUs

Others

Market Segmentation by Mechanical Type

Cooling Systems

Racks

Others

Market Segmentation by General Construction

Building Development

Installation and Commissioning Services

Building Design

Physical Security

DCIM

Market Segmentation by Cooling Systems

CRAC& CRAH Units

Chiller Units

Economizers & Evaporative Coolers

Cooling Towers & Dry Coolers

Other Cooling Units

Market Segmentation by Facility Size

Small Data Centers

Medium Data Centers

Hyperscale Data Centers

Market Segmentation by Tier Standards

Tier I and Tier II

Tier III

Tier IV

US Data Center Construction Market: Geography

South Eastern US dominated the market share in 2018 and is expected to grow at a CAGR of around 1.2% during the forecast period. Virginia gained the highest investment, followed by North Carolina, Georgia, Alabama, and Florida. Recently, Facebook invested around $2 billion in a data center in Henrico, Virginia. In the Southwestern US, Texas received the highest investments in 2018, whereas Oklahoma and New Mexico witnessed significant investment by Google and Facebook data centers. The availability of robust fiber connectivity and low power rates has primarily contributed to the increased growth in the region.

Market Segmentation by Geography

- South Eastern US
- South Western US
- Mid-Western US
- Western US
- North Eastern US

Key Vendor Analysis

The US data center construction market is continuing to grow in terms of greenfield, brownfield, and modular data center construction. The market is witnessing the increased growth of data centers across the US, with the high adoption of efficient and modular data center infrastructure solutions. The market has a strong presence of vendors in all three categories - electrical infrastructure, mechanical infrastructure, and general construction.

Market Participants in the US Data Center Construction Market:

Key Construction Contractors

- AECOM
- Corgan
- DPR Construction
- Holder Construction
- Jacobs Engineering Group
- Syska Hennessy Group

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Turner Construction

Key Infrastructure Providers

ABB

Airedale Air Conditioning

Eaton

Schneider Electric

STULZ

Vertiv

Key Data Center Investors

Apple

COPT Data Center Solutions

CyrusOne

Digital Realty

Equinix

Facebook

Google

Microsoft

Stream data center

Vantage Data Center

Other Prominent Construction Contractors are Balfour Beatty, BlueScope Construction, Clune Construction, Fluor Corp., Fortis Construction, Gensler, Gilbane Building Co., HDR, Hensel Phelps, HITT Contracting, Hoffman Construction, JE Dunn Construction, Morrison Hershfield, Mortenson Construction, Rogers-O'Brien Construction, Structure Tone, Walsh Group, and Whiting-Turner Contracting.

Prominent Infrastructure Providers

Altima Technologies

Asetek

Bloom Energy

Caterpillar

Cormant

Cummins

Cyber Power System

Data Aire

Delta Group

FNT

Generac Power System

Green Revolution Cooling

Hewlett Packard Enterprise

HighPower

Hitech Power Protection

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Legrand

Nlyte Software

Nortek Humidity

Mitsubishi

MTU On Site Energy

Rittal

Trane

Tripp Lite

Prominent Data Center Investors

CoreSite

DataBank

DC Blox

EdgeConnex

H5 Data Centers

Quality Technology Services

RagingWire

Sabey Data Centers

TierPoint

T5 Data Center

Key market insights include:

The report provides the following insights into the US data center construction market for the forecast period 2019–2024.

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

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