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Data Center Market - Global Outlook and Forecast 2021-2026

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Data Center Market Report

The data center market by revenue is expected to grow at a CAGR of 4.5% during the period 2021–2026.

The global data center market size has witnessed a significant boost since the outbreak of the COVID-19 pandemic across the globe. The demand for data centers has increased because of the increased access to internet-related services aided by nation-wide lockdowns imposed by governments worldwide. The COVID-19 pandemic has significantly increased the internet traffic between 25% and 30% during the initial lockdown period (March-April) worldwide, which is 10X times than normal growth (~3% per month). Cloud-based services have observed a spike as organizations, including government bodies, require to transfer, store, and secure confidential data and information. Similarly, the impact of COVID-19 has been unprecedented on the IoT devices market. IoT-enabled devices have witnessed high acceptance for monitoring and surveillance purposes, especially in the healthcare sector.

The following factors are likely to contribute to the growth of the data center market during the forecast period:

Increase in the Procurement of Renewable Energy Sources

High Innovations in Innovative Data Center Technology

Increase in Adoption of 200/400 GbE Switch Ports

Adoption of AI-Enhanced Liquid Immersion & Direct-to-Chip Cooling

The study considers the present scenario of the data center market and its market dynamics for the period 2020?2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Data Center Market Segmentation

The global data center market research report includes a detailed segmentation by infrastructure , IT infrastructure, electrical infrastructure, mechanical infrastructure, cooling technique, general construction, tier standards, geography. The IT infrastructure market is growing due to the increasing investment in data centers as well as hyperscale facilities. A majority of revenue is expected to be generated by server systems, followed by storage and network infrastructure during the forecast period. The introduction of artificial intelligence-based infrastructure solutions is influencing the overall market growth. The adoption of UPS with over 2 MW is high because of the increased construction of large and hyperscale facilities. Hyperscale operators are increasingly purchasing renewable energy sources to power their operations and reduce carbon emissions. To reduce power consumption, service operators are implementing innovative and energy-efficient cooling infrastructure solutions. The use of free cooling techniques has grown significantly over the last few years in regions that have favorable climatic conditions that can utilize evaporative/adiabatic coolers for data center cooling purposes. The cooling systems market is expected to grow over the next few years because of redundancy and high heat generation at the rack level.

The adoption of cloud-based services and the development of hyperscale facilities are expected to be strong drivers for the global IT infrastructure market. North America is likely to witness an increase in the enterprise adoption of colocation spaces for operations, which, in turn, will increase the revenue for high-performance infrastructure. Artificial Intelligence and IoT will be a strong driving force for IT infrastructure procurement in the market during the forecast period.

Several data center facilities in North America have witnessed the implementation of 2N redundant UPS systems. Hyperscale operators are deploying end-of-rack UPS solutions supporting up to six racks. The increasing procurement of renewable energy will reduce the procurement of generator systems in the region. The UK, Germany, the Netherlands, France, and Ireland are the major contributors to the power infrastructure revenue in Western Europe. To conserve energy, the procurement of OCP-based infrastructure solutions and architecture is significant. The Nordic region is expected to witness the procurement of 48V DC UPS systems. Most facilities in the Nordic region are powered through renewable energy with grid stability of over 95%, which reduced the dependency on redundant generator systems.

The deployment of tall racks of 45U?52U is experiencing strong adoption in North America. Most data centers are designed based on the American Society of Heating, Refrigeration, and Air-conditioning Engineers (ASHRAE) guidelines. Data centers in North America are adopting air- and water-cooled chillers with the economizer mode to facilitate partial cooling of the facility using outside air.

North America has a strong presence of general and sub-contractors. The competition will increase over the next few years. Expertise in developing data centers within a short time (less than one year) will be a key criterion for data center operators to select contractors. Western Europe is the most active market for data center construction. The increase in demand for data centers has multiplied the number of contractors and sub-contractors in the market. Several Europe-based construction service providers in the region manage several major data center construction projects that include architects and engineering tasks. However, a major challenge for contractors in the region is the non-availability of skilled professionals to manage hyperscale data center projects. The APAC region has a strong presence of both local and global contractors. The average labor cost in several countries, including India, is inexpensive than in the US and Europe.

In 2020, around 15 Tier IV data centers were opened in the US, Belgium, Irelands, Netherlands, Singapore, and Sweden. These facilities generate more revenue, with focused investment on highly efficient cooling systems. The increase in data center build-out announcements from Apple, Facebook, and Google is expected to a major boost to the tier IV market. The global Tier I & Tier II data center market is expected to register a negative CAGR during the forecast. Over the years, the increased awareness of the use of redundant infrastructure has reduced the market share. A majority of under-developed projects across the globe fall under the Tier III category, which is likely to continue during the forecast period. However, several operators are likely to shift to the Tier IV category based on the growth in rack power density and critical data center applications.

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By Infrastructure

IT

Electrical

Mechanical

General Construction

By IT Infrastructure

Servers

Storage

Network

By Electrical Infrastructure

UPS Systems

Generators

Transfer Switches and Switchgears

PDUs

Other Electrical Infrastructures

By Mechanical Infrastructure

Cooling Systems

CRAC & CRAH Units

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Chiller Units

Cooling Towers, Dry Coolers, & Condensers

Other Cooling Units

Racks

Others Mechanical Infrastructure

By Cooling Technique

Air-based Cooling Technique

Liquid-based Cooling Technique

By General Construction

Core and Shell Development

Installation and Commissioning Services

Engineering and Building Designs

Physical Security

DCIM/BMS

By Tier Standards

Tier I &II

Tier III

Tier IV

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INSIGHTS BY GEOGRAPHY

The US data center market is expected to reach approx. $104 billion by 2026, growing at a CAGR of over 3%. Strong growth of AI-based infrastructure solutions, which are increasing the rack power density over 15 kW, is a major driving factor for the market. The high procurement of NVMe-based all-flash storage solutions, coupled with the increased deployment of 25 GbE and 100 GbE switch ports, is influencing the market growth. Also, the incorporation of custom-designed solutions namely OCP-based infrastructure will continue to grow. The deployment of 5G across the region is likely to result in strong data growth and application workloads, resulting in high-performance computing infrastructure procurement as well as the construction of edge data centers across the region.

By Geography

- North America
  - US
  - Canada
- Latin America
  - Brazil
  - Other Countries
- Western Europe
  - UK
  - Germany
  - France
  - Netherlands
  - Ireland

- Other Countries
- Nordic
  - Denmark
  - Iceland & Finland
  - Norway
  - Sweden
- Central & Eastern Europe
  - Russia & Czech Republic
  - Poland & Austria
  - Other Central and Eastern Countries
- Middle East
  - GCC
  - Other Middle Eastern Countries
- Africa
  - South Africa
  - Kenya
  - Other African Countries
- APAC
  - China & Hong Kong
  - Australia & New Zealand

India

Japan

Rest of APAC

Southeast Asia

Singapore

Malaysia

Thailand

Indonesia

Other South Eastern Countries

INSIGHTS BY VENDORS

The global data center market share is characterized by the presence of several global and regional vendors, which operating under several verticals – IT, storage, network, electrical, mechanical, and general construction. The IT market witnessed significant growth in revenue contribution from ODM server manufacturers. HPE, Dell Technologies, dominate the leading revenue share in the server and storage markets. Vendor offerings are concentrated on technologies such as cloud, big data, artificial intelligence, and IoT-based application workloads. However, to gain market share, vendors should target enterprises in the APAC and MEA regions. With a revenue share of around 39%, Cisco dominated the market, and the revenue growth has been aided by strong demand for Application Centric Infrastructure (ACI) product portfolio. ABB, Eaton, Schneider Electric, and Vertiv are the leading power infrastructure players. Cummins, KOHLER-SDMO, MTU On-Site Energy, and Caterpillar have a strong presence in the generators market.

Key Data Center Critical (IT) Infrastructure Providers

Cisco

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Dell Technologies

Hewlett Packard Enterprise (HPE)

Huawei

IBM

Inspur Group

Key Data Center Support Infrastructure Providers

ABB

Eaton

Rittal

Schneider Electric

STULZ

Vertiv

Caterpillar

Cummins

Key Data Center Contractors

AECOM

Bouygues

DPR Construction

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Holder Construction

Jacobs Engineering

Mercury Engineering

M+W Group

Key Data Center Investors

Apple

Amazon Web Services (AWS)

CyrusOne

Digital Realty

Equinix

Facebook

GDS Holdings

Google

Microsoft

NTT Communications

Other Prominent Critical (IT) Infrastructure Providers

Arista

Atos

Broadcom

Extreme Networks

Hitachi Vantara

Inventec

Juniper

Lenovo

NEC

NetApp

Oracle

Pure Storage

Quanta Cloud Technology (Quanta Computer)

Super Micro Computer

Wistron (Wiwynn)

Other Prominent Data Center Support Infrastructure Providers

Airedale Air Conditioning

Asetek

Alfa Laval

Altima Technologies

Assa Abloy

Bosch Security Systems

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The Condair Group

Delta Group

Green Revolution Cooling (GRC)

Hitech

KOHLER (SDMO)

Legrand

Nlyte Software

Rolls Royce Power Systems AG

Mitsubishi Electric Corporation

Socomec Group

Trane

ZincFive

Other Prominent Data Center Contractors

Arup Group

Cap Ingelec

Corgan

CSF Group

Faithful+Gould

Fluor Corporation

Fortis Construction

Gensler

Gilbane Building CO.

HDR Architecture

ISG

Jones Engineering

Kirby Group

KKR Investment Group (Aceco TI SA)

Larsen & Toubro (L&T)

Linesight

Mace Group

Morrison Hershfield

Mortenson Construction

Red-Engineering

Structure Tone

Syska Hennessy Group

Winthrop

Other Prominent Data Center Investors

21VIANET (Century Internet Data Center)

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Africa Data Centres

Canberra Data Centres

Cologix (COLO-D)

Colt Data Centre Services (Colt DCS)

Compass Data Centers (Root Data Center)

COPT Data Center Solutions

CoreSite Realty

Etisalat Group

Global Switch

Keppel DC

NEXTDC

QTS Realty Trust

Scala Data Centers

Shanghai Athub

ST Telemedia Global Data Centres (STT GDC)

Tenglong Holdings Group (Tamron)

Teraco Data Environments

Turkcell

Vantage Data Center

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KEY QUESTIONS ANSWERED

1. What is the market size and growth rate of the data center market during the forecast period?
2. What safety protocols and measures have taken by data center operators after the outbreak of the COVID-19 pandemic?
3. How the emergence of 5G network is to affect the global data center market?
4. Who are the notable market players in the global data center market?
5. What are the innovative data center technologies boosting the market growth?

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39 OTHER PROMINENT DATA CENTER INVESTORS

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