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

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Abstracts

This market research report on the data center market in Americas offers analysis on market size and forecast, market share, industry trends, growth drivers, and vendor analysis. It includes insights about segmentation by infrastructure (electrical, mechanical, and general construction), electrical infrastructure (UPS, rack PDU, generators, transfer switch and switchgeat, and others), mechanical infrastructure (cooling, rack, and others), general construction (building design, installation services, building development, security, and DCIM), tier standards (tier 1 and tier 2, tier 3, and tier 4), and geography (North America and Latin America).

Data Center Market in Americas - Overview

The increasing adoption of cloud, IoT, and big data analytics along with growing consumption of online video and audio content is driving the growth of the data center market in Americas. The US contributes more than 85% of the total revenue in the data center market in Americas. The increasing number of colocation and managed service providers, including hyperscale data center operators in the US is likely to attribute to revenue growth during the forecast period. Data center operators are investing in significant capital annually in the construction of additional data centers as they can support processing of exabytes of data generated by both business and consumer users. Leading colocation and hyperscale data center operators are expected to invest heavily in the construction of new facilities throughout the forecast period.

The growing demand for data center services across various industries such as BFSI and IT is expected to drive the data center market in Americas. Vendors in the market are focusing on the installation of energy-efficient infrastructure that functions to reduce energy consumptions and carbon emissions. Hyperscale operators are investing heavily

on renewable energy sources to power their facilities. The growing demand for edge data center facilities will alsodrive the construction of new data centers in the Americas. The data center market in America generated revenue of $8.49 billion in 2017, growing at a CAGR of close to 6% during the forecast period.

Data Center Market in Americas - Dynamics

Content Delivery Network is expected to grow at a CAGR of around 20% in the US and over 30% in Canada and Latin America

The construction of data centers in the Americas is primarily concentrated in major regions and cities that include South Eastern US, South Western US, Toronto, Montreal, and Sao Paulo. The growth of connected devices across business and consumer segments has helped to popularize the concept of edge computing in the region. The increasing demand for high bandwidth from rural areas and the growing demand for edge data centers will drive the market growth in the Americas. The market will witness a rapid deployment of data centers facilities such as modular, containerized, and performance optimized data center (POD) for establishing edge data centers, on-demand infrastructure requirements, and cost reduction. Prominent investors in data center development include Equinix, Digital Realty and DuPont Fabros Technology, CyrusOnem, Facebook, Switch, Ascenty.

Data Center Market in Americas - Segmentation

This market research report includes a detailed segmentation of the market by infrastructure, electrical infrastructure, mechanical infrastructure, general construction, tier standards, and geography.

Data Center Market in Americas - Infrastructure

Lithium-ion UPS, evaporative cooling, and intelligent PDUs are gaining popularity in the data center market in Americas

In term of infrastructure, the data center market in Americas consists of three major sectors: electrical, mechanical, and general construction. The market is witnessing innovations to improve energy efficiency and reduce power wastage. The adoption of energy-efficient infrastructure in N+N, 2N, 2N+1 redundant configuration will drive the data center power and cooling infrastructure market growth in Americas. The introduction of pre-fabricated modular rack systems and containment cooling design

(hot/cold aisle) will boost the demand for modular data centers infrastructures in the Americas during the forecast period.

Data Center Market in Americas - Electrical Infrastructure

The electrical infrastructure segment of the data center market in Americas is further divided into UPS, rack PDU, generators, transfer switches and switchgear, and others. The rack power distribution unit (PDU) segment is the fastest growing sector in the electrical infrastructure segment, growing at a CAGR of 6.24% during the forecast period. The widely available PDUs across data centers in Americas are basic PDU, metered PDU, monitored PDU, switched PDU, and automatic transfer switch PDUs. Leading vendors are offering innovative solutions such as lithium-ion battery powered UPS systems, diesel rotary UPS systems (DRUPS), and metered and switched rack PDUs that enable complete control over power flow. The increase in the construction of modern data centers of tier 3 and tier 4 standards, especially with IT load of more than 5 MW with redundant power infrastructure will grow the market during the forecast period.

Data Center Market in Americas - Mechanical Infrastructure

Free-cooling systems are gaining popularity in various Northern US and Canadian cities

The data center market in Americas by mechanical infrastructure consists of three major sectors: cooling systems, rack, and other mechanical infrastructure. The indirect evaporative free-cooling systems, chilled-water systems, and CRAH units will experience increased adoption during forecast period. The growing popularity of these evaporative cooling systems in Northern US and Canada is likely to drive the growth of the data center market in Americas. Computer room air conditioners (CRAC), computer room air handlers (CRAH), chiller systems, cooling towers, dry coolers, and economizers are the different types of cooling systems available in the market. The data center market in Americas by cooling systems is expected to grow at a CAGR of about 6% during the forecast period.

Data Center Market in Americas - General Construction

DCIM software to include artificial intelligence (AI) and robot monitoring systems during the forecast period

The data center market in Americas by general construction consists of five major sectors: building development, installation and commissioning services, building design,

security, and DCIM. The development of sustainable mega data center facilities will drive the market for building development, design, and installation and commissioning services. The data center infrastructure management (DCIM) market is expected to grow through increased complexity of operating data center infrastructure and reduce the power consumption of facilities during the forecast period. Additionally, the integration of artificial intelligence (AI) and robotics in data centers will enable service providers to provide additional features such as predictive and perspective analysis. The data center market in Americas by DCIM solutions is expected to reach around $250 million, growing at an exponential CAGR of about 15% during the forecast period.

Data Center Market in Americas - Tier Standards

The average cost of constructing tier 3 facility is about $750 and more than 65 tier 3 data centers were under construction in 2017

The tier standard segment in the data center market in Americas is divided into tier 1 and tier 2, tier 3, and tier 4. Currently, there are more than 10 tier 4 data centers under construction in the US. This tier standard has a minimum 2N+1 redundancy in power, cooling infrastructure with around 2.4 minutes of annual downtime, and availability of 99.995%. The presence of hyperscale developers such as Facebook, Apple, Microsoft, and Google are the highest contributors in the tier 4 standard segment. The data center market in Americas by tier 4 data center is expected to generate revenue of about $3,910 million, growing at an impressive CAGR of 8.10% during the forecast period.

Data Center Market in Americas - Geography

Leading data center construction locations include Virginia, Texas, Montreal, Toronto, and Brazil

The data center market in Americas is further classified into two major geographical segments: North America and Latin America. The rise in demand for infrastructure as a service (IaaS) across Americas will boost the data center investment from colocation providers and hyperscale data center operators in North America and Latin America.

The use of modular infrastructure solutions is gaining popularity in the data center market. Latin American telecommunication providers and government agencies are investing heavily to improve network connectivity between Latin America countries such as Brazil and the US. The Brazil, Chile, Colombia, and Mexico data center markets are experiencing steady growth in terms of data center investments from local and global

colocation and cloud service providers (CSP). The data center market in Latin America is expected to grow at a CAGR of around 12% during the forecast period.

Key Countries Profiled

The key countries profiled in the report are:

- US
- Canada
- Brazil
- Colombia
- Chile

Key Vendor Analysis

The significant growth and increased investment for the construction of new data centers is generating business opportunities for various vendors in the American market. The three main participants in the data center market are infrastructure providers, general construction contractors, and data center operators. The increasing focus on reducing carbon emissions and decreasing power consumptions is encouraging players to construct data centers that operate energy efficient infrastructure and powered by renewable energy sources. Further, the rise in the number of colocation and cloud data center with innovative designs will intensify the competition for infrastructure and construction contractors in the data center market in Americas. Colocation service providers will target tier 2 and tier 3 states in the US for edge data center developments.

The major vendors in the global market are:

By Infrastructure Providers

- ABB
- Airedale Air Conditioning

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Eaton

General Electric

Schneider Electric

STULZ

Vertiv

By General Construction Contractors

Turner Construction

Holder Construction

DPR Construction

Jacobs Engineering Group

Corgan

AECOM

Syska Hennessy Group

Aceco TI S.A

By Data Center Operators

Equinix

Digital Realty and DuPont Fabros Technology

CyrusOne

Facebook

Switch

Ascenty

Other prominent vendors include

Rittal, Caterpillar, Cummins, Cyber Power Systems, Delta Group, Geist Global, Generac Power Systems, Hewlett Packard Enterprise (HPE), Legrand, Nlyte Software, Tripp Lite, Clune Construction, Fluor Corp., 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., CoreSite Reality Corp., DataBank, EdgeConnex, Google, Microsoft, OVH, RagingWire Data Centers (NTT), T5 Data Centers, TierPoint, Colo-D, and Urbacon Data Center Solutions.

Key Market Insights include

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

Report Snapshot

The increasing adoption of cloud, IoT, and big data analytics along with growing consumption of online video and audio content is driving the growth of the data center market in Americas. In addition, the rise in internet penetration among consumers for personal and business purposes through mobile and broadband network connectivity is propelling the growth of the data center market in Americas. North America and Latin America are expected to occupy the largest market share in the region during the

forecast period.

Base Year: 2017

Forecast Year: 2018–2023

The study considers the present scenario of the data center market in Americas and its market dynamics for the period 2018?2023. It covers a detailed overview of various market growth enablers, restraints, and trends. The study covers both the demand and supply side of the market. It profiles and analyzes 19 leading and 37 other prominent market participants across infrastructure vendors, data center general construction contractors, and colocation providers companies operating in the market.

Major Vendors in Data Center Market in Americas

ABB

Overview

Product Offerings

Key News

Eaton

General Electric

Airedale Air Conditioning

STULZ

Schneider Electric

Vertiv

Turner Construction

Holder Construction

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DPR Construction

Jacobs Engineering Group

Corgan

AECOM

Syska Hennessy Group

Aceco TI S.A

Equinix

Digital Realty and DuPont Fabros Technology

CyrusOne

Facebook

Switch

Ascenty

Prominent Players in Data Center Market in Americas

By Infrastructure Providers

Rittal

Product Offerings

Caterpillar

Cummins

Data Aire

Cyber Power Systems

Delta Group

Geist Global

Generac Power Systems

Hewlett Packard Enterprise (HPE)

Nortek Humidity (Condair Group)

Legrand

Nlyte Software

Tripp Lite

By General Construction Contractors

Clune Construction

Fluor Corp.

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.

By Data Center Operators

CoreSite Reality Corp.

DataBank

EdgeConnex

Google

Microsoft

OVH

RagingWire Data Centers (NTT)

T5 Data Centers

TierPoint

Colo-D

Urbacon Data Center Solutions

Market Segmentation by Infrastructure

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Electrical

Mechanical

General construction

Market Segmentation by Electrical Infrastructure

UPS Systems

Generators

Transfer Switch and Switchgear

Rack PDU

Other Infrastructure

Market Segmentation by Mechanical Infrastructure

Cooling Systems

Rack

Other Infrastructure

Market Segmentation by General Construction

Building Development

Installation and Commissioning

Building Design

Physical Security

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DCIM

Market Segmentation by Tier Standard

Tier 1 and Tier 2

Tier 3

Tier 4

Market Segmentation by Geography

North America
US
Northeastern US

Southeastern US

Mid-western US

South Western US

Western US

Canada

Latin America
Brazil

Colombia

Chile

Others

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