

Data Center PDU Market - Global Outlook and Forecast 2020-2025

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Abstracts

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

The data center PDU market by revenue is expected to grow at a CAGR of over 4% during the period 2019–2025.

Global data center PDU market size by revenue is expected to cross \$2.8 billion by 2025, growing at a CAGR of more than 4% during the forecast period. The global data center power distribution unit (PDU) market has evolved significantly in the last decade, with innovations focused on improving efficiency and reducing space in data centers. The complexity of the operating environment has increased in recent years, with varied power distribution deployment, supporting both high-density and low-density environments. The use of traditional floor PDU has decreased considerably, where modular floor systems are adopted among data centers. The use of bus bar has grown significantly, especially facilities installed with hot/cold aisle containment systems. The increasing awareness to reduce power consumption and wastage and improve efficiency in data centers is driving the adoption of intelligent PDUs in facilities. The use of basic PDUs will continue to decline throughout the forecast period, aiding in the growth of intelligent products in the market. There is an increasing need among colocation facilities to meter and monitor customer rack power consumption, which has led to the growth of intelligent solutions among colocation end-users.

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

Growing Rack Power Density in Data Centers

Software-defined Power to Monitor & Automate Power Infrastructure

Rising Demand for Edge Data Centers

Colocation Investments Boost Power Infrastructure Procurement

The study considers the present scenario of the data center PDU market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspect of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Global Data Center PDU Market Segmentation

The global data center PDU market research report includes a detailed segmentation by product, rack PDU, end-users, and geography. The increasing rack power density and the need to operate facilities at low PUE are increasing the adoption of busway systems. Reduced installation costs and high reliability efficiencies are the major benefits of busway systems. The global data center busway market is dominated by the US with the highest investment of around 45%, followed by China & Hong Kong, Germany, Denmark, Canada, the Netherlands and UK. Colocation service providers are the major investors in busway systems along with hyperscale data center operators.

Basic PDUs are among the common rack PDU device used in a traditional data center environment. In 2019, the use of existed among smaller facilities with less rack capacity and supplied with the power of less than 500 kW. The use of basic systems accounted for over 6% of the market investment. Over the last five years, there has been an increasing awareness among facility operators to monitor power distribution to IT racks in data centers. A majority of basic solution deployments is identified among developing countries.

Colocation providers have predominantly adopted busway systems for power distribution. The adoption of hot/cold aisle deployments has grown significantly in these environments. With the increasing interest shown by colocation providers to operate facilities at a PUE of less than 1.40, these facilities are being equipped with intelligent PDUs that aid in overcoming wastage of power at the rack-level. Colocation facilities will continue to drive the data center PDU market during the forecast period, with facilities

being built with at least 500 racks or modular facility construction that feature at least 40 racks PDUs in a hot/cold aisle containment of 20 racks.

Segmentation by Product

Busway Systems

Rack PDU

Floor PDU

Segmentation by Rack PDU

Basic PDU

Metered PDU

Monitored PDU

Switched & Managed PDU

Segmentation by End-users

Colocation Data Centers

Enterprise Data Centers

INSIGHTS BY GEOGRAPHY

North America has been a major contributor to the power distribution market, with many recent activities targeting the construction of hyperscale facilities with over 20 MW of power capacity and with rack power density of over 15 kW. The US is the largest market for both busway systems and rack PDUs with the increasing construction of hyperscale and colocation facilities. Small and medium facilities from enterprises and governments are still adopting floor and rack systems. With the increasing adoption of HPC resources, the market for the busway system is likely to witness growth along with rack

solutions. The data center rack PDU market has witnessed increase in the deployment of metered and monitored systems along with the increase in popularity of switchedmanaged. The adoption of intelligent systems offering remote monitoring, metering and switched functionality has grown significantly. The US is the major adopter of metered and switched systems. The market is also witnessing a decline in the adoption of basic systems during the forecast period.

Segmentation by Geography

North America

US

Canada

Latin America

Brazil

Other Countries

Western Europe

UK

Germany

France

Netherlands

Ireland

Others

Nordics

Denmark

Finland & Iceland

Sweden

Norway

Central Eastern Europe

Russia & Czech Republic

Poland & Austria

Other Countries

Middle East

GCC

Other Countries

Africa

South Africa

Morocco

Other Countries

APAC

China & Hong Kong

Australia & New Zealand

India

Japan

Rest of APAC

Southeast Asia

Malaysia

Singapore

Thailand

Indonesia

Other Countries

INSIGHTS BY VENDORS

The data center PDU market has a strong presence of global and regional vendors that are offering end-to-end power infrastructure solutions for data centers. The market has witnessed several innovations in PDUs in the last years to reduce cost, increase flexibility in installation of the systems and easy management of solutions in a complex data center environment. Traditional floor solutions have been replaced by busbar trunking systems among several facilities. Most of the competition is related to pricing, configuration, and features offered by the PDU solutions. The brand power plays an important role with leading vendors offering other power infrastructure solutions competing with pure-play market leaders.

Prominent Key Vendors

EAE

Eaton

Hewlett Packard Enterprise (HPE)

Legrand

Rittal

Schneider Electric

Siemens

Vertiv

Other Prominent Vendors

ABB

Anord Mardix

ATEN

Austin Hughes

BellWin Information Co. Ltd.

Black Box Network Services

Canovate Group

Chatsworth Products

Cisco Systems

Conteg

Crenlo (Emcor)

Cyber Power Systems

Dataprobe

Delta Group

DigiPower

Elcom International

Enlogic (CIS Global)

Fujitsu

Leviton

Panduit

Powertek

Prism Enclosures

Rack Solutions

Retex

Schleifenbauer

Siemon Company

Socomec Group

Toshiba Corporation

Tripp Lite

KEY QUESTIONS ANSWERED

1. What is the data center PDU market size and growth rate during the forecast period?
2. What are the factors impacting the growth of the data center PDU market share?
3. What are the drivers, trends, and restraints in the data center PDU market?
4. Who are the prominent vendors in the data center PDU market, and what are their market shares?
5. What is the impact of the COVID-19 pandemic on the data center PDU market share?

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