

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

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Abstracts

This market research report on the data center power market in Americas offers analysis on market size and forecast, market share, industry trends, growth drivers, and vendor analysis. The study includes insights on segmentation by power infrastructure (UPS, generators, transfer switch and switchgear, rack PDU, and other electrical infrastructure), tier standards (Tier 1 and Tier 2, Tier 3, and Tier 4), and geography (North America and South America).

Data Center Power Market in Americas - Overview

The growing demand for continuous connectivity, high performance, and superior electrical design is driving the growth of the data center power market in Americas. The data center market in Americas is dominated by the US, followed by Canada and Latin America. Colocation providers and hyperscale cloud data center developers are major revenue contributors to the data center power market in Americas. Largescale data center construction and implementation of mega scale data centers, especially in the Southeast and Southwest US region are driving the data center power market in Americas. The growth in rack power density aided through use of high performance infrastructure and the virtualization of IT infrastructure will create new business opportunities for the leading players in the data center power market in Americas. Moreover, the adoption of modular, scalable, and lithium-ion powered systems will augment the development of the data center power market in Americas.

Growing number of data center outages and increasing critical IT load and availability requirements are boosting the importance of redundancy in data centers and fueling the demand for data center power capacities in the American market. The rising adoption of metered, monitored, switch, and metered-by outlet PDUs will attribute to the growth of

the data center power market in America. The data center power market in Americas is projected to grow at a CAGR of around 5.50% during the forecast period.

Data Center Power Market in Americas - Dynamics

The data center power market is witnessing the adoption of 2N, N+N, and 2N+1 redundant infrastructure across modern Tier 3 and Tier 2 facilities. In addition, there is also a high demand for automation and monitoring solutions in the data power center market in Americas. The rise in power consumption and power wastage is encouraging companies to install end-to-end monitoring and automation solutions in the facilities in the Americas. Data center automation helps identifying the maintenance requirement of infrastructure to avoid operational failures and provide power backup during outages. The introduction of innovative infrastructure will help vendors in the data center power market in Americas gain a larger market share and attract new customers.

Data Center Power Market in Americas - Segmentation

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

Data Center Power Market in Americas – Electrical Infrastructure

UPS systems and PDUs are installed with 2N redundancy, dual power feed from utility, and diesel generators to boost market growth

The electrical infrastructure segment in the data center power market is classified into UPS, generators, transfer switches and switchgears, rack PDUs, and other electrical infrastructure. Uninterruptible Power Supply (UPS) was the largest electrical infrastructure segment in the data center power market in Americas, accounting for over 34% of the total market share in 2017. The different types of UPS available in the market are standby UPS, line interactive UPS, and double conversion UPS. The development of modern data center is encouraging vendors to design UPS systems that provide dual line of power with innovative load balancing mechanisms. The growing demand for lithium-ion batteries that increase efficiency and reduce operational expenditure will fuel the growth of this market segment in the data center power market in Americas during the forecast period.

Data Center Power Market in Americas –Tier Standard

Tier 3 and Tier 4 will generate high revenue for the market during the forecast period

The data center power market in Americas by tier standard is categorized into Tier 1 and Tier 2, Tier 3, and Tier 4. Several Tier 3 facilities are adopting Tier 4 redundancy for data center power infrastructure such as UPS and PDUs. Tier 4 is the fastest growing segment in the data center power market, growing at a CAGR of about 7% during the forecast period. Factors such as infrastructure performance, efficiency, redundancy, and high availability are propelling the demand for Tier 4 structures in the data center power market in Americas. Tier 4 data centers are designed to have a minimum 2N+1 redundancy in power and cooling infrastructure with around 2.4 minutes of annual downtime and availability of 99.995%. The rising number of hyperscale data center constructions in the various parts of the American region will propel the growth of this market segment over the next few years.

Data Center Power Market in Americas – Geography

South America to be the fastest growing region in the data center power market in Americas during forecast period

The geographical segment in the data center power market in Americas is divided into North America and South America. Latin America is the fastest growing region in the data center power market, growing at a CAGR of around 12% during the forecast period. Compared to North American countries, Latin American countries are more involved in the adoption of N+N redundancy for generators because of high power fluctuations. The construction of mega data center facilities in Latin American will involve the adoption of 2N redundant infrastructure with increase in IT load of more than 8 kW per rack.

KEY COUNTRIES PROFILED

The key countries profiled in the report are:

US

Canada

Brazil

Colombia

Chile

Key Vendor Analysis

The data center power market in Americas consists of both regional and international players. The vendors in the American market are focusing on offering specific products or complete infrastructure solutions for data centers to remain competitive in the market. Leading companies are focusing on introducing modern innovations across infrastructure with advanced products that offer more than 90% efficiency for data center operations and help in achieving higher availability operations. The growing adoption of lithium-ion batteries, increase power capacity of single infrastructure, adoption of modular solutions and real-time power monitoring solutions will create new opportunities for companies in the data center power market in Americas.

The major vendors in the global market are:

ABB

Eaton

General Electric

Schneider Electric

Vertiv

Other prominent vendors include Active Power (Piller Power Systems), Rittal, Caterpillar, Cummins, Cyber Power Systems, Delta Group, Geist Global, Generac Power Systems, HighPower, Hitec Power Protection, Legrand, Nlyte Software, and Tripp Lite.

Key market insights include

1. The analysis of the data center power market in Americas 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 power market in Americas.

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 of data center power market in Americas.
5. The report offers a detailed overview of the vendor landscape, competitive analysis, and key market strategies to gain competitive advantage.

REPORT SNAPSHOT

According to the latest industry analysis by Arizton, the data center power market in Americas is expected to reach \$5,130 million by 2023, growing at a CAGR of more than 5% during the report 2017–2023. The market research report provides in-depth market and segmental analysis of the data center power market in Americas by product, distribution channel, material, and geography.

The data center power market in Americas is driven by incorporation of modular infrastructure, which is efficient, reduces OPEX, requires less maintenance, and decreases space. The implementation of intelligent real-time monitoring software that offer predictive maintenance solutions will contribute to the growth of the data center power market in Americas.

Base Year: 2017

Forecast Year: 2018–2023

The study considers the present scenario of the global data center power 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 the leading five companies and eleven other prominent companies operating in the market.

Major Vendors in the Data Center Power Market in Americas

ABB

Overview

Product Offerings

Key News

Eaton

General Electric

Schneider Electric

Vertiv

Prominent Players in the Data Center Power Market in Americas

Active Power (Piller Power Systems)

Product Offerings

Rittal

Caterpillar

Cummins

Cyber Power Systems

Delta Group

Geist Global

Generac Power Systems

HighPower

Hitec Power Protection

Legrand

Nlyte Software

Tripp Lite

Market Segmentation by Electrical Infrastructure

UPS

Generators

Transfer switch & switchgear

Rack PDU

Other electrical infrastructure

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