

# Data Center Power Market in US- Industry 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 U.S. Data Center Power Market Report

The US data center power market share is expected to grow at a CAGR of over 3% during the period 2019–2025.

South Eastern U.S. is one of the major contributors to the U.S. data center power market. With a power capacity share of over 40%, the region attracted high initial investments, especially Virginia, which witnessed over \$1 billion in 2019. States such as Virginia, Arizona, Illinois, Nevada, California, Texas, Ohio, Tennessee, Iowa, and North Carolina have received significant investments in recent years. Colocation providers are the major investors, accounting over 50% share, with enterprises, hyperscale operators, and government entities contributing to the rest of the investments. North America is likely to dominate the global data center power market with over 50 hyperscale development projects to be operational in the United States and Canada in the coming years. The U.S. market is likely to experience a rise in edge data center computing to deliver services with low latency and high efficiency. There is a significant rise in the number of data centers that run blockchain and cryptocurrency workloads across the U.S. market. These blockchain and cryptocurrency facilities consuming hundreds of megawatts of capacity. This is likely to boost the U.S. power market growth during the forecast period.

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

Increasing Procurement of Renewable Energy

Emergence of Nickel-Zinc & Prussian Blue Sodium-ion Battery UPS Systems

Use of Fuel Cells in Data Centers

Adoption of DC UPS Systems to Reduce Power Loss

The study considers the present scenario of the US data center power 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.

## U.S. DATA CENTER POWER MARKET SEGMENTATION

This research report includes a detailed segmentation by power infrastructure, UPS systems, generators, tier standards, and geography. The adoption of lithium-ion batteries is growing significantly during the forecast period as their price will continue to decline. Since most vendors are offering lithium-ion based UPS systems, the market is likely to become highly competitive during the forecast period. The U.S. generator market will continue to grow because of the construction of large and mega facilities. However, with growing concerns over carbon emissions, the use of diesel generators is expected to decline, thereby providing growth opportunities to natural gas generators. The growing complexity of data center infrastructure is propelling the growth of automated switchgear technology. With the increased construction of data centers across the country, the market for transfer switches and switchgears is also expected to grow during the forecast period. The adoption of rack PDUs supporting up to 20 kW will increase with the use of high-performance computing infrastructure in the United States.

Most data centers have a minimum of N+1 power redundancy configuration in their UPS systems in the South-Western U.S. A prominent vendor in the region procured UPS with Eco Mode designed flexibility to support up to 2N+1 redundant configuration. Several facilities in the Mid-western region are equipped with dedicated UPS systems with minimum N+1 power redundancy. Most UPS systems in the Western US are installed with a capacity of 500–750 kVA. Data centers facilities with below 10 MW of power capacity will commonly comprise 500 kVA of capacity per unit, whereas there are facilities with a power capacity above 10 MW that will comprise up to over 750 kVA UPS units in the North Eastern U.S. The application of

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