

Data Center Rack 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 Rack Market Report

The data center rack market by investment is expected to grow at a CAGR of approx. 6% during 2020–2026.

The data center rack market is experiencing high innovation due to the increased demand from service providers to reduce CAPEX and OPEX. The adoption of OCP-based rack architecture is a significant boost to the growth of 42U and 48U. Also, open 19, 8U, and 12U rack cages are likely to witness growth among data center spaces during the forecast period, fueling growth for below 42U. Moreover, the growing interest of operators toward open rack architecture is increasing opportunities for vendors. These innovative architectures are made to cope up with current infrastructure requirements. The increasing adoption of IT infrastructure at the rack level leads to complexity in cable and airflow management, prompting data center operators to procure deeper and wider rack architecture. This scenario is likely to continue throughout the forecast period. The OCP community is currently working on the Rack & Power Project, focusing on standards designed for data centers, aiming to integrate the rack into the data center infrastructure itself, leading to the interdependence of data center infrastructure.

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

Increasing Deployments of Edge Data Centers

High Adoption of Open Rack Architecture

Growing Data Center Investments

Increasing Investment in Hyperscale Facilities

The study considers the present scenario of the data center rack 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 Rack Market Segmentation

The data center rack market research report includes a detailed segmentation by rack size, products, end-users, geography. In terms of investment, the global 42U rack market is likely to lead the market, accounting for over USD 613 million by 2026. The global 42U racks market expects to reach over 376 thousand units in 2026, growing at a CAGR of 8%. The demand for 42U will continue to be high, with steady growth in revenue due to the construction of new facilities and increased renovations. 42U will continue to dominate the market as they are commonly applied industry-standard racks. With the growing demand for taller racks in North America, the ASP of 42U will decline slowly as colocation providers are likely to adopt units of several sizes depending on their operational requirements. However, they are likely to be replaced by 45U, 47U, and 48U during the forecast period. The global 45U-47U racks market is likely to reach over 321 thousand units in 2026, growing at a CAGR of around 7%. The segment will continue to grow over the next few years as several operators are procuring these racks as they are like 42U in terms of pricing.

Enclosures & cabinets are likely to cross over USD 1.9 billion by 2026, growing at a CAGR of approx. 6%. The adoption of racks and their associated accessories varies from one facility to another. The cost will increase based on accessories adopted. Most facilities are developing hot/cold aisle containment systems, where racks are installed with cable and airflow management accessories. Continuous innovations and advances in technology have led to the increased demand for performance-optimized data centers (POD). Western Europe witnessed a total investment of over 86,000 cabinets in 2020, wherein colocation service providers led market investments with over 85% of the total capacity in the region. In Nordic, the growth in edge data centers due to increasing

penetration of 5G services and modular facilities will also increase cabinets and accessories investments.

In 2020, the colocation market witnessed the installation of 400,000 racks. The APAC region was the major contributor, with the addition of 180,000 in over 95 colocation facilities. North America follows it with the acquisition of over 100,000 in over 110 colocation facilities. The Middle East & Africa region witnessed the adoption of over 18,000 rack capacity in over 20 colocation data center facilities. In Europe, the total investment observed around 92,000 cabinets in over 100 colocation facilities in 2020.

Rack Size

Below 42U

42U

45?47U

48U

Other Rack Sizes

Product

Racks Enclosures & Cabinets

Accessories

End-user

Colocation Data Centers

Enterprise Data Centers

INSIGHTS BY GEOGRAPHY

The North American data center rack market share is the largest, and is expected to reach USD 819 million by 2026, growing at a CAGR of approx. 4%. Organizations in North America are currently building high-performance-computing data centers, which are likely to increase the demand for innovative and high-capacity racks. The digital economy in the US grows 10% YoY. The market is the largest in the world in terms of rack infrastructure spending and support infrastructure investments. E-commerce, real estate, BFSI, healthcare, and government sectors are the major contributors toward digitalization in the region. In recent years, the demand for high-bandwidth data services and the increased usage of internet services worldwide have led to the increased adoption of high-capacity racks to hold several servers. Virginia contributed the maximum number of racks, with over 44,000 being deployed between January 2020 and June 2021. This was followed by Texas, which contributed to over 29,000 racks. California, Oregon, Ohio, and Utah contributed to over 10,000 racks each.

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 rack market is aided by partnerships between rack vendors and data center operators worldwide. Many support infrastructure providers such as Schneider Electric, Vertiv Group, Eaton, Rittal, and Legrand offer rack infrastructure solutions in the market. IT infrastructure providers such as HPE, Dell Technologies, and IBM provide rack infrastructure solutions in partnership with other vendors supplying pre-installed IT infrastructure to data centers. The range of products, costs of the products, and the pre & post-installation services are significant factors for revenue generation for the vendors. The data center rack market has the presence of both local and global providers.

Prominent Data Center Rack Providers

Eaton

Hewlett Packard Enterprise (HPE)

Legrand

Schneider Electric

Rittal

Vertiv Group

Other Prominent Data Center Rack Providers

Austin Hughes Electronics

Beijing Finen Electronic Equipment

Belden

BLACKBOX

C&F Group

Cannon Technologies

Canovate

Chatsworth Products

Cisco Systems

Conteg

Crenlo (Emcor)

Cyber Power Systems

Dataracks

Delta Electronics

Enconnex

FUJITSU

Great Lakes Data Racks & Cabinets

IBM

Inspur

Oracle

Panduit

Prism Enclosures

Rack Solutions

Rahi Systems

Retex

Schroff (nVent)

com

Tripp Lite

USystems

KEY QUESTIONS ANSWERED:

1. How big is the data center rack market in terms of unit shipment?
2. What will be the value of the Data Center Rack Market during 2020-2026?
3. What are opportunities in the data center rack market?
4. How many types of racks are used in data centers? Which rack type generate the highest revenues?
5. Is increased investment in hyperscale facilities influencing the data center rack

market growth?

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