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Data Center Rack PDU Market - Global Outlook and Forecast 2019-2024

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Abstracts

The data center rack PDU market is likely to reach around $1.5 billion by 2024, growing at a CAGR of approximately 7% during 2018–2024.

The emergence of edge computing facilities is expected to boost the demand for rack PDUs after 2022. Although the demand for reducing energy consumption in data centers is increasing the adoption of PDU worldwide, the increase in the rack power density is one of the primary factors boosting the data center rack PDU market.

The data center rack PDU market is witnessing multiple transformations. The market is gaining traction due to an increased focus on end-to-end monitoring, the adoption of prefabricated data centers as on-premise solutions, the construction of retail and wholesale colocation facilities, and the growth in the rack power density in data centers.

The replacement of basic PDU solutions with intelligent PDU in facilities is expected to drive the demand for data center rack PDUs globally. Countries such as the US, the UK, Germany, France, the Netherlands, Singapore, China, and Hong Kong, and Australia are expected to emerge as major contributors to the data center rack PDU market. Eaton, Vertiv, Schneider Electric, and Legrand (Server Technology and Raritan) are the leading vendors in the rack PDU market

The research report on the data center rack PDU market covers market sizing and forecast, market share, industry trends, growth drivers, and vendor analysis. The study includes insights on segmentation by end-users (colocation data center and enterprise data center), type (basic PDU, metered PDU, monitored PDU, and managed/switched PDU), and geography (America, EMEA, and APAC).

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The report considers the present scenario of the data center rack PDU market and its market dynamics for the period 2019?2024. It covers a detailed overview of various market growth enablers, restraints, and trends. The study covers both the demand and supply sides of the market. It also profiles and examines leading companies and other prominent companies operating in the market.

Data Center Rack PDU Market: Segmentation

This market research report includes detailed market segmentation by end-user, type, and geography. Colocation service providers dominated the investment landscape for rack PDUs in 2018. The continuous investment in new facilities by service providers is likely to drive the segment during the forecast period. Further, the growing inclination among colocation service providers to run data center operations at a PUE of less than 1.40 is likely to increase adoption for intelligent PDUs.

Basic PDUs are likely to witness a decline in their adoption during the forecast period. The absence of power monitoring capacities in basic PDUs is a major factor for declining adoption. Further, the rise of intelligent PDU solutions will reduce the market share of the basic PDU segment. Intelligent PDU solutions are increasing in adoption due to the increasing awareness for power monitoring in IT racks in data centers.

The metered PDU segment is expected to grow at a CAGR of around 5% during the forecast period. Several data center operators will consider procuring metered PDUs during the forecast period as the awareness toward metering customer racks is growing, especially in developing economies. The shipment of metered PDU solutions is likely to increase during the forecast period. The demand for monitored rack PDUs is growing as they aid in remote monitoring of single- or three-phase voltage, frequency, and load levels in the real-time.

Market Segmentation by End-user

Colocation data center

Enterprise data center

Market Segmentation by Type

Basic PDU

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Metered PDU

Monitored PDU

Managed/switched PDU

Data Center Rack PDU Market: Geography

The EMEA region accounted for the major market share in 2018 and is expected to grow at a CAGR of around 6% during the forecast period. The implementation of GDPR in Europe and the increased demand for data center services due to the growing adoption of cloud, big data, and IoT technology are driving the data center rack PDU market in EMEA. The growth in hyperscale data center construction will increase the demand for intelligent PDU solutions is expected to drive the rack PDU market in the Nordic region.

Equinix, Digital Realty, Facebook, Google, Coresite, CyrusOne, DataBank, Tier Point, and Switch are major data center investors contributing to the growth of the data center rack PDU market in the US. The growing construction of data center facilities in the US is likely to increase the growth of the rack PDU market.In the Americas, the data center development in the US and Canada will mostly be of Tier III and Tier IV standards. In Latin America, colocation and telecommunication service providers are the major contributors to the market revenue along with hyperscale cloud data center developers.

Market Segmentation by Geography

Americas
- US
- Canada
- Latin America

EMEA
- Western Europe

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Nordic Region

Central & Eastern Europe

Middle East & Africa

APAC

China & Hong Kong

Australia & New Zealand

Southeast Asia

India

Rest of APAC

Key Vendor Analysis

The increase in procurement of advanced IT infrastructure solutions to support the growth in application workloads has led to an increase in the rack power density. Most vendors in the data center rack PDU market are involved in offering basic PDU, metered PDU, monitored PDU, and switched/managed PDU solutions. They are competing in terms of pricing, configuration, and features. Further, the availability of local vendors and the procurement of ODM or customized PDU products will also lead to low-cost offerings of PDU solutions, which will lead to the increased competition among prominent vendors in the market.

Prominent Vendors

Eaton

Hewlett Packard Enterprises (HPE)

Legrand

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Rittal

Schneider Electric

Vertiv

Other Prominent Vendors

ATEN

Austin Hughes

Black Box Network Services

Chatsworth Products

Cisco Systems

Conteg

Crenlo

CyberPower Systems

Delta Group

DigiPower

Enlogic

Leviton

Panduit

Prism Enclosures

Rack Solutions

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Retex

Siemon

Socomec Group

Tripp Lite

Key Market Insights

This market research report included the following insights:

Offers market sizing and growth prospects of the data center rack PDU market for the forecast period 2019–2024

Provides comprehensive insights on the latest industry trends, market forecast, and growth drivers in the data center rack PDU market

Includes a detailed analysis of market growth drivers, challenges, and investment opportunities

Delivers a complete overview of market segments and the regional outlook of the data center rack PDU market

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key market strategies to gain a competitive advantage in the data center rack PDU market

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