

U.S. Data Center Power Market - Industry 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 U.S. Data Center Power Market Report

The U.S. data center power market by investment is expected to grow at a CAGR of 4% during the period 2021–2026.

The growing popularity of Internet of Things (IoT), emergence of 5G networks, COVID-19 pandemic, and the growing demand for quick streaming of online entertainment content are major drivers for U.S. data center market growth. The Northern Virginia region witnessed a strong demand for construction or expansion of existing data centers from hyperscale operators due to the rapid increase in the use of online services. The media and health industries emerging as the largest end-users in the region. The colocation uptake led to multiple new announcements toward data center development in Q3 2020. Investments in the power infrastructure increased by 15% in 2020 compared to the previous years.

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

Innovative UPS Battery Technology

Increase in Procurement of Renewable Energy Sources

Growth in Data Center Investment

Increase in Construction of Hyperscale Data Centers

The study considers the present scenario of the U.S. data center power 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.

U.S. Data Center Power Market Segmentation

The U.S. Data center power market research report includes a detailed segmentation by infrastructure, UPS system capacities, generators system capacities, tier standards, geography. For the optimal performance, the data center power infrastructure is an essential component. It supplies power to IT equipment, cooling infrastructure, networking equipment, and other related infrastructure. The adoption of lithium-ion batteries is growing significantly YOY in the US market. A continued decline in prices of lithium-ion batteries will fuel the adoptions among data centers. It is expected that the contribution from colocation providers will be high in terms of lithium-ion UPS solutions. The installation of generators with higher redundancy is low in the US, and facilities are powered via renewable energy sources. The adoption of Diesel Rotary Uninterruptible Power Supply (DRUPS) systems is comparatively lower than stand-alone UPS systems and diesel generators. The growing complexity of data center infrastructure is propelling the growth of automated switchgear technology. Transfer switches and switchgear are expected to grow during the forecast period due to the increased data center construction in the US. Most US operators are installing intelligent PDUs due to the growing awareness to reduce power consumption and wastage in data centers.

In South Western US, diesel generators are more likely to be adopted than bi-fuel or natural gas ones. Generators are usually built with N+1 redundancy in the region. Diesel generators are expected to decline in the coming years because of increasing concerns over carbon emissions. Fuel cell generators will also likely to slow down the demand for other generator systems by 2026. The use of portable generators is also growing in the US market. With operators moving toward edge data centers, the adoption of less than 1 MW generator systems is expected to grow during the forecast period. The deployment of modular data centers is expected to be a major driver for less than 1 MW generator systems during the forecast period.

The (2 MW

By Tier Standards

Tier I & II

Tier III

Tier IV

INSIGHTS BY GEOGRAPHY

South Eastern US is the developed data center market. In 2020, around 35 data centers witnessed investment in South Eastern US. Colocation providers dominate the market with the overall share of 80%. South Eastern US received an investment of over \$3 billion from hyperscale operators such as Apple, Facebook, Microsoft, Google. The increased construction of new facilities in the region will offer new opportunities for power infrastructure provider. The region is likely to experience a rise in the number of edge data centers to accomplish activities, with low latency and high efficiency, which will further contribute to an increase in the cumulative revenue opportunity for power infrastructure providers. The region is also experiencing increase in the procurement of renewable energy to power data centers. Major states in the region observed the adoption of N+1 power redundancy in 2020. The adoption of rack PDUs supporting over 10 kW is expected to increase with the use of high-performance computing infrastructure.

By Geography

US

South Eastern US

Western US

South Western US

Mid-Western US

North Eastern US

INSIGHTS BY VENDORS

The U.S. data center power market is becoming highly competitive due to increased innovations in power solutions to offer maximum efficiency and reliability. Operators are more susceptible to procuring energy-efficient power infrastructure solutions. Evolving requirements of operators are prompting vendors to develop innovative products that reduce OPEX. In terms of UPS and rack PDU infrastructure, ABB, Eaton, Legrand, Schneider Electric, and Vertiv are the leading market players. Over the next few years, data center operators are more likely to consider the adoption of lithium-ion batteries, fuel cell technology, and intelligent PDUs to improve the facility efficiency. The emergence of nickel-zinc batteries and Prussian sodium-ion batteries will continue to intensify the competition among UPS systems vendors.

Key Company Vendors

ABB

Caterpillar

Cummins

Eaton

Legrand

Schneider Electric

Vertiv Group

Other Prominent Vendors

AEG Power Solutions

Advanced Energy (Artesyn)

Austin Hughes Electronics

Black Box Network Services (AGC Networks)

Bloom Energy

Bayetech

Bxterra Power Technology

Chatsworth Products

Cisco Systems

Emcor Group

Cyber Power Systems

Controlled Power Company

Dataprobe

Delta Power Solutions

Detroit Diesel

EAE Elektrik

Elcom International

Enconnex

Exide Technologies

Fuji Electric

Generac Power Systems

Hewlett Packard Enterprise (HPE)

Hitachi Hi-Rel Power Electronics

HITEC Power Protection

Mitsubishi Electric Corporation

Natron Energy

Panduit

INNIO

Kohler

Marathon Power

Piller Power Systems

Plug Power

Rittal Systems

Pramac

Rolls-Royce Power Systems

Riello Elettronica Group

Saft (Total)

Siemens

Socomec Group

Tripp Lite

Toshiba International Corporation

VYCON

Virtual Power Systems

Western Telematic, Inc. (WTI)

Yanmar Group (HIMOINSA)

ZAF Energy Systems

ZincFive

KEY QUESTIONS ANSWERED

1. What innovations are observed in the data center power infrastructure market?
2. How does the COVID-19 pandemic boost the demand for data center services during the forecast period?
3. What is the growth rate of the U.S. data center power market?
4. Which UPS systems are expected to dominate the market shares during the forecast period?
5. Who are the key players in the U.S. data center power market?

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