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US Hyperscale Data Center Market - Industry Outlook & Forecast 2021-2026

https://marketpublishers.com/r/UBDB81EAD53DEN.html
Date: September 2021
Pages: 339
Price: US$ 3,750.00 (Single User License)
ID: UBDB81EAD53DEN

Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this US Hyperscale Data Center Industry Outlook & Forecast Market Report

The US hyperscale data center market by investment is expected to grow at a CAGR of 3.30% during the period 2021–2026.

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

5G Deployment & Hyperscale Data Centers

Rising Investment in Hyperscale Data Centers

Cloud & Connectivity Drive Demand for Hyperscale Data Centers

IoT & Big Data Drive Demand for Hyperscale Data Centers

US HYPERSCALE DATA CENTER MARKET OUTLOOK

The US is witnessing massive growth in internet usage by people and businesses. The country is the largest market in terms of data center operations, and it is continuing to grow due to the higher consumption of data by end-users. The growing popularity of the Internet of Things (IoT) is a major driver for the U.S. hyperscale data center market, leading to additional facilities that can support exabytes of data generated by both business users and consumers.

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SNIPPETS

In 2020, the US was the major contributor in terms of investment to the hyperscale market.

The adoption of high-performance infrastructure supporting high-density workloads will rise during the forecast period.

The price of SSDs will continue to decline. The US will be the major market for high-capacity SSD solutions across the globe.

Submarine cable investments will improve in-land connectivity and reduce latency, thereby boosting the US hyperscale data center market growth.

In terms of electrical infrastructure, UPS systems are likely to dominate the hyperscale data center market with a market share of over 28%, followed by generators and transfer switches & switchgear with around 27% and 21%, respectively.

US HYPERSCALE DATA CENTER MARKET GROWTH FACTORS

The data center market in the US has witnessed acquisition of facilities by real estate and investment firms. These acquisitions are followed by expansion, leading to a strong growth of the hyperscale data center market in the US.

Tax incentives, renewable energy, and reliable electricity supply accelerate the investment for the hyperscale data center market across the US.

The study considers the present scenario of the US hyperscale data center market and its market dynamics for the period 2021?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.

US HYPERSCALE DATA CENTER MARKET SEGMENTATION

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This research report includes a detailed segmentation by

Infrastructure

IT Infrastructure

Electrical Infrastructure

Mechanical Infrastructure

Cooling Systems

Cooling Technique

General Construction

Geography

SEGMENTATION ANALYSIS

The US hyperscale data center market share by IT infrastructure will witness a growth of 3.86% during the forecast period. Enterprises are shifting businesses from small server rooms to data centers for high-performance and high-capacity infrastructure. The COVID-19 pandemic grew the infrastructure adoption among internet-related service providers such as e-commerce, online video streaming, and social media in Q1 and Q2 2020. In the IT infrastructure segment, most of the revenue is generated by server systems, followed by storage and network infrastructure.

The US data center market by server infrastructure is expected to reach USD 19.55 billion in 2026. The market for server infrastructure has witnessed growth in the past years. The increase in demand for server shipments will continue to grow moderately as enterprises are likely to move to the cloud or colocation platforms for their IT infrastructure operations.

The US hyperscale cooling market by cooling systems was valued at USD 1.82 billion in 2020. Cooling systems are adopted in data centers to reduce the heat generated by IT infrastructure. The adoption of cooling systems depends on cost

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and efficiency, which is likely to play a major role in selecting vendors.

Market Segmentation by Infrastructure

IT Infrastructure

Electrical Infrastructure

Mechanical Infrastructure

General Infrastructure

Market Segmentation by IT Infrastructure

Server Infrastructure

Storage Infrastructure

Network Infrastructure

Market Segmentation by Electrical Infrastructure

UPS Systems

Generators

Transfer Switches & Switchgears

PDUs

Other Electrical Infrastructure

Market Segmentation by Mechanical Infrastructure

Cooling Systems

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Racks

Other Mechanical Infrastructure

Market Segmentation by Cooling Systems

CRAC & CRAH Units

Chiller Units

Cooling Towers, Condensers, & Dry Coolers

Economizers & Evaporative Coolers

Other Cooling Units

Market Segmentation by Cooling Technique

Air-Based Cooling Technique

Liquid-Based Cooling Technique

Market Segmentation by General Construction

Core & Shell Development

Installation & Commissioning Services

Building & Engineering Design

Physical Security

DCIM/BMS

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GEOGRAPHICAL ANALYSIS

In the South-Eastern US, Virginia led the maximum data center investment in 2020, followed by Texas, Alabama, Oregon, and Ohio. The major investors in Virginia were CyrusOne, COPT Data Center Solutions, Digital Realty, Aligned, Facebook, Microsoft, and QTS Realty Trust. Virginia distributed over USD 100 million in tax exemptions in 2020, making it an investor-friendly destination for hyperscale data center investment in the US. Amazon Web Services (AWS) plans to invest over USD 200 million to develop a data facility in Virginia to expand its footprint in the region. In addition to self-built data centers, hyperscale operators are among the region's largest customers for colocation service providers. The construction of new facilities in the region will offer new opportunities for Support and IT infrastructure vendors, which will contribute significantly to their revenue growth. It is expected that the hyperscale investment will continue to grow in the region during the forecast period.

Market Segmentation by Geography

- South-Eastern US
- Western US
- South-Western US
- Mid-Western US
- North-Eastern US

INSIGHTS BY VENDORS

The US hyperscale data center market is witnessing growth in revenue from ODM server manufacturers such as Quanta Cloud Technology (QCT) (Quanta Computer) and Wiwynn (Wistron). ODM server manufacturers will be significant competitors to other vendors such as Hewlett Packard Enterprise, Dell Technologies, IBM, Inspur, Lenovo, and Cisco Systems. Vendor offerings are concentrated on technologies such as cloud, big data, AI, and IoT-based application workloads. Every major storage vendor is facing strong competition from all-flash storage offerings. The market for ODM storage systems is rising the demand for OCP design-based storage products used in hyperscale data centers.

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Key IT Infrastructure Providers

- Arista Networks
- AccelStor
- Atos
- Broadcom
- Cisco Systems
- DataDirect Networks
- Dell Technologies
- Extreme Networks
- Fujitsu
- Hewlett Packard Enterprise (HPE)
- Hitachi Vantara
- Huawei Technologies
- IBM
- Intel Technologies
- Infortrend Technology
- Inspur
- MiTAC Holdings
- NetApp

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Nimbus Data

Pivot3

Micron Technology

QNAP Systems

Quanta Cloud Technology

Samsung

Super Micro Computer

Synology

VIOLIN

Juniper Networks

Lenovo

Western Digital

Wiwynn (Wistron)

Key Support Infrastructure Vendors

ABB

Airedale International Air Conditioning

Asetek

Bloom Energy

Caterpillar

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Condair Group

Cormant

Cummins

Cyber Power Systems

Data Aire

Delta Power Solutions

Eaton

FNT Software

Generac Power Systems

Green Revolution Cooling (GRC)

HITEC Power Protection

KOHLER

Legrand

Mitsubishi Electric

Natron Energy

Nlyte Software

Rolls Royce Power Systems

Schneider Electric

STULZ

Rittal

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Toshiba

Trane (Ingersoll Rand)

Tripp Lite

Vertiv Group

Yanmar

ZincFive

Key Construction Contractors

AECOM

Arup

Balfour Beatty US

BlueScope Construction

Corgan

Clune Construction

DPR Construction

Fortis Construction

Gensler

Gilbane Building Company

Fluor Corporation

HDR Architecture

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Holder Construction Group

HITT Contracting

Hoffman Construction

Jacobs Engineering Group

JE Dunn Construction Group

Linesight

M+W Group (Exyte)

Morrison Hershfield

Mortenson

Rogers-O'Brien Construction

Structure Tone (STO Building Group)

Syska Hennessy Group

The Walsh Group

Turner Construction Company

Key Data Center Investors

Apple

Amazon Web Services (AWS)

Aligned

Compass Datacenters

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CyrusOne

COPT Data Center Solutions

CoreSite Realty

DataBank

Digital Realty

EdgeCore Internet Real Estate

Equinix

Facebook

Flexential

fifteenfortyseven Critical Systems Realty

GIGA Data Centers

Google

H5 Data Centers

Microsoft

NTT Global Data Centers

Iron Mountain

QTS Realty Trust

Switch

Stack Infrastructure

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Vantage Data Centers

New Entrants

Cirrus Data Services

Novva

PointOne

Quantum Loophole

Yondr

KEY QUESTIONS ANSWERED:

1. How big is the US hyperscale data center market?
2. What are the latest market trends & opportunities in the hyperscale data center market in the US?
3. What is the impact of COVID-19 on hyperscale data centers?
4. What is the market size of the U.S. hyperscale data center in terms of area?
5. Who are the key IT infrastructure providers in the US hyperscale data center market?

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Contents

1 RESEARCH METHODOLOGY

2 RESEARCH OBJECTIVES

3 RESEARCH PROCESS

4 SCOPE & COVERAGE

4.1 Market Definition
4.2 Base Year
4.3 Scope of the Study
4.4 Market Segments
  4.4.1 Market Segmentation by Infrastructure
  4.4.2 Market Segmentation by IT Infrastructure
  4.4.3 Market Segmentation by Electrical Infrastructure
  4.4.4 Market Segmentation by Mechanical Infrastructure
  4.4.5 Market Segmentation by Cooling Systems
  4.4.6 Market Segmentation by Cooling Techniques
  4.4.7 Market Segmentation by General Construction
  4.4.8 Market Segmentation by Geography

5 REPORT ASSUMPTIONS & CAVEATS

5.1 Key Caveats
5.2 Currency Conversion
5.3 Market Derivation

6 MARKET AT A GLANCE

7 INTRODUCTION

7.1 Internet & Data Growth
7.2 Electricity Pricing in US
7.3 Data Center Site Selection Criteria

8 MARKET OPPORTUNITIES & TRENDS

+44 20 8123 2220
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8.1 Deployment of Microgrids in Hyperscale Data Centers
8.2 Innovative Data Center Technologies
8.3 AI Boosts Liquid Immersion & Direct-To-Chip Cooling Adoption
8.4 Innovative UPS Battery Technologies
8.5 Rising Procurement of Renewable Energy for Hyperscale Data Centers
8.6 Adoption of Hyperconverged & Converged Infrastructure Platforms

9 MARKET GROWTH ENABLERS

9.1 COVID-19 on Hyperscale Data Center Market
9.2 5G Deployment & Hyperscale Data Centers
9.3 Rising Investment in Hyperscale Data Centers
9.4 Cloud & Connectivity Drive Demand for Hyperscale Data Centers
9.5 IoT & Big Data Drive Demand for Hyperscale Data Centers
9.6 M&As to Fuel Hyperscale Data Center Growth
9.7 Tax Incentives to Boost Hyperscale Investment

10 MARKET RESTRAINTS

10.1 Location Constraints for Hyperscale Data Center Construction
10.2 Data Center Security Challenges
10.3 Dearth of Skilled Workforce
10.4 Increased Carbon Emissions from Data Centers
10.5 Increasing Water Consumption by Hyperscale Operators

11 MARKET LANDSCAPE

11.1 Market Overview
11.2 Investment: Market Size & Forecast
11.3 Area: Market Size & Forecast
11.4 Power Capacity: Market Size & Forecast
11.5 IT Infrastructure: Market Size & Forecast
11.6 Support Infrastructure: Market Size & Forecast
11.7 Five Forces Analysis
  11.7.1 Threat of New Entrants
  11.7.2 Bargaining Power of Suppliers
  11.7.3 Bargaining Power of Buyers
  11.7.4 Threat of Substitutes
  11.7.5 Competitive Rivalry

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info@marketpublishers.com

12 INFRASTRUCTURE

12.1 Market Snapshot & Growth Engine
12.2 IT Infrastructure
  12.2.1 Market Overview
  12.2.2 Market Size & Forecast
12.3 Electrical Infrastructure
  12.3.1 Market Overview
  12.3.2 Market Size & Forecast
12.4 Mechanical Infrastructure
  12.4.1 Market Overview
  12.4.2 Market Size & Forecast
12.5 General Construction
  12.5.1 Market Overview
  12.5.2 Market Size & Forecast

13 IT INFRASTRUCTURE

13.1 Market Snapshot & Growth Engine
13.2 Server Infrastructure
  13.2.1 Market Overview
  13.2.2 Market Size & Forecast
13.3 Storage Infrastructure
  13.3.1 Market Overview
  13.3.2 Market Size & Forecast
13.4 Network Infrastructure
  13.4.1 Market Overview
  13.4.2 Market Size & Forecast

14 ELECTRICAL INFRASTRUCTURE

14.1 Market Snapshot & Growth Engine
14.2 UPS Systems
  14.2.1 Market Overview
  14.2.2 Market Size & Forecast
14.3 Generators
  14.3.1 Market Overview
  14.3.2 Market Size & Forecast

+44 20 8123 2220
info@marketpublishers.com

14.4 Transfer Switches & Switchgear
14.4.1 Market Overview
14.4.2 Market Size & Forecast
14.5 Power Distribution Units
14.5.1 Market Overview
14.5.2 Market Size & Forecast
14.6 Other Electrical Infrastructure
14.6.1 Market Overview
14.6.2 Market Size & Forecast

15 MECHANICAL INFRASTRUCTURE

15.1 Market Snapshot & Growth Engine
15.2 Cooling Systems
15.2.1 Market Overview
15.2.2 Market Size & Forecast
15.3 Racks
15.3.1 Market Overview
15.3.2 Market Size & Forecast
15.4 Other Infrastructure
15.4.1 Market Overview
15.4.2 Market Size & Forecast

16 COOLING SYSTEMS

16.1 Market Snapshot & Growth Engine
16.2 CRAC & CRAH Units
16.2.1 Market Overview
16.2.2 Market Size & Forecast
16.3 Chiller Units
16.3.1 Market Overview
16.3.2 Market Size & Forecast
16.4 Cooling Towers, Condensers & Dry Coolers
16.4.1 Market Overview
16.4.2 Market Size & Forecast
16.5 Economizers & Evaporative Coolers
16.5.1 Market Overview
16.5.2 Market Size & Forecast
16.6 Other Cooling Units

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info@marketpublishers.com

16.6.1 Market Overview
16.6.2 Market Size & Forecast

17 COOLING TECHNIQUE

17.1 Market Snapshot & Growth Engine
17.2 Air-Based Cooling Techniques
17.2.1 Market Overview
17.2.2 Market Size & Forecast
17.3 Liquid-Based Cooling Techniques
17.3.1 Market Overview
17.3.2 Market Size & Forecast

18 GENERAL CONSTRUCTION

18.1 Market Snapshot & Growth Engine
18.2 Core & Shell Development
18.2.1 Market Overview
18.2.2 Market Size & Forecast
18.3 Installation & Commissioning Services
18.3.1 Market Overview
18.3.2 Market Size & Forecast
18.4 Building & Engineering Design
18.4.1 Market Overview
18.4.2 Market Size & Forecast
18.5 Physical Security
18.5.1 Market Overview
18.5.2 Market Size & Forecast
18.6 DCIM/BMS Solutions
18.6.1 Market Overview
18.6.2 Market Size & Forecast

19 GEOGRAPHY

19.1 Geography: Market Snapshot & Growth Engine
19.2 Area: Market Snapshot & Growth Engine
19.3 Power Capacity: Market Snapshot & Growth Engine

20 SOUTH-EASTERN US

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info@marketpublishers.com

20.1 Market Overview
20.2 Investment: Market Size & Forecast
20.3 Area: Market Size & Forecast
20.4 Power Capacity: Market Size & Forecast
20.5 Support Infrastructure: Market Size & Forecast

21 WESTERN US

21.1 Market Overview
21.2 Investment: Market Size & Forecast
21.3 Area: Market Size & Forecast
21.4 Power Capacity: Market Size & Forecast
21.5 Support Infrastructure: Market Size & Forecast

22 MID-WESTERN US

22.1 Market Overview
22.2 Investment: Market Size & Forecast
22.3 Area: Market Size & Forecast
22.4 Power Capacity: Market Size & Forecast
22.5 Support Infrastructure: Market Size & Forecast

23 SOUTH-WESTERN US

23.1 Market Overview
23.2 Investment: Market Size & Forecast
23.3 Area: Market Size & Forecast
23.4 Power Capacity: Market Size & Forecast
23.5 Support Infrastructure: Market Size & Forecast

24 NORTH-EASTERN US

24.1 Market Overview
24.2 Investment: Market Size & Forecast
24.3 Area: Market Size & Forecast
24.4 Power Capacity: Market Size & Forecast
24.5 Support Infrastructure: Market Size & Forecast

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info@marketpublishers.com

25 COMPETITIVE LANDSCAPE

25.1 IT Infrastructure
25.1.1 Server Infrastructure
25.1.2 Storage Infrastructure
25.1.3 Network Infrastructure
25.2 Electrical Infrastructure
25.3 Mechanical Infrastructure
25.4 General Construction

26 KEY IT INFRASTRUCTURE PROVIDERS

26.1 Arista Networks
26.1.1 Business Overview
26.1.2 Product Offerings
26.2 Accelstor
26.2.1 Business Overview
26.2.2 Product Offerings
26.3 Atos
26.3.1 Business Overview
26.3.2 Product Offerings
26.4 Broadcom
26.4.1 Business Overview
26.4.2 Product Offerings
26.5 Cisco Systems
26.5.1 Business Overview
26.5.2 Product Offerings
26.6 Datadirect Networks
26.6.1 Business Overview
26.6.2 Product Offerings
26.7 Dell Technologies
26.7.1 Business Overview
26.7.2 Product Offerings
26.8 Extreme Networks
26.8.1 Business Overview
26.8.2 Product Offerings
26.9 Fujitsu
26.9.1 Business Overview
26.9.2 Product Offerings

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26.10 Hewlett Packard Enterprise (HPE)
26.10.1 Business Overview
26.10.2 Product Offerings
26.10.3 Key News
26.11 Hitachi Vantara
26.11.1 Business Overview
26.11.2 Product Offerings
26.11.3 Key News
26.12 Huawei Technologies
26.12.1 Business Overview
26.12.2 Product Offerings
26.12.3 Key News
26.13 IBM
26.13.1 Business Overview
26.13.2 Product Offerings
26.13.3 Key News
26.14 Intel Technologies
26.14.1 Business Overview
26.14.2 Product Offerings
26.15 Infortrend Technology
26.15.1 Business Overview
26.15.2 Product Offerings
26.16 Inspur
26.16.1 Business Overview
26.16.2 Product Offerings
26.17 Mitac Holdings
26.17.1 Business Overview
26.17.2 Product Offerings
26.18 Netapp
26.18.1 Business Overview
26.18.2 Product Offerings
26.19 Nimbus Data
26.19.1 Business Overview
26.19.2 Product Offerings
26.20 Pivot3
26.20.1 Business Overview
26.20.2 Product Offerings
26.21 Micron Technology
26.21.1 Business Overview

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26.21.2 Product Offerings
26.22 Qnap Systems
26.22.1 Business Overview
26.22.2 Product Offerings
26.23 Quanta Cloud Technology (Quanta Computer)
26.23.1 Business Overview
26.23.2 Product Offerings
26.24 Samsung
26.24.1 Business Overview
26.24.2 Product Offerings
26.25 Super Micro Computer
26.25.1 Business Overview
26.25.2 Product Offerings
26.26 Synology
26.26.1 Business Overview
26.26.2 Product Offerings
26.26.3 Key News
26.27 Violin (Storcentric)
26.27.1 Business Overview
26.27.2 Product Offerings
26.28 Juniper Networks
26.28.1 Business Overview
26.28.2 Product Offerings
26.29 Lenovo
26.29.1 Business Overview
26.29.2 Product Offerings
26.30 Western Digital
26.30.1 Business Overview
26.30.2 Product Offerings
26.31 Wiwynn (Wistron Corporation)
26.31.1 Business Overview
26.31.2 Product Offerings

27 KEY SUPPORT INFRASTRUCTURE VENDORS

27.1 ABB
27.1.1 Business Overview
27.1.2 Product Offerings
27.2 Airedale International Air Conditioning

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info@marketpublishers.com

27.2.1 Business Overview
27.2.2 Product Offerings
27.2.3 Key News
27.3 Asetek
27.3.1 Business Overview
27.3.2 Product Offerings
27.4 Bloom Energy
27.4.1 Business Overview
27.4.2 Product Offerings
27.5 Caterpillar
27.5.1 Business Overview
27.5.2 Product Offerings
27.6 Condair Group
27.6.1 Business Overview
27.6.2 Product Offerings
27.7 Cormant
27.7.1 Business Overview
27.7.2 Product Offerings
27.8 Cummins
27.8.1 Business Overview
27.8.2 Product Offerings
27.9 Cyber Power Systems
27.9.1 Business Overview
27.9.2 Product Offerings
27.10 Data Aire
27.10.1 Business Overview
27.10.2 Product Offerings
27.11 Delta Power Solutions
27.11.1 Business Overview
27.11.2 Product Offerings
27.12 Eaton
27.12.1 Business Overview
27.12.2 Product Offerings
27.12.3 Key News
27.13 FNT Software
27.13.1 Business Overview
27.13.2 Product Offerings
27.13.3 Key News
27.14 Generac Power Systems

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27.14.1 Business Overview
27.14.2 Product Offerings
27.15 Green Revolution Cooling (GRC)
27.15.1 Business Overview
27.15.2 Product Offerings
27.16 Hitec Power Protection
27.16.1 Business Overview
27.16.2 Product Offerings
27.17 Kohler
27.17.1 Business Overview
27.17.2 Product Offerings
27.18 Legrand
27.18.1 Business Overview
27.18.2 Product Offerings
27.19 Mitsubishi Electric
27.19.1 Business Overview
27.19.2 Product Offerings
27.19.3 Key News
27.20 Natron Energy
27.20.1 Business Overview
27.20.2 Product Offerings
27.21 Nlyte Software
27.21.1 Business Overview
27.21.2 Product Offerings
27.22 Rolls-Royce Power Systems
27.22.1 Business Overview
27.22.2 Product Offerings
27.22.3 Key News
27.23 Schneider Electric
27.23.1 Business Overview
27.23.2 Product Offerings
27.24 Stulz
27.24.1 Business Overview
27.24.2 Product Offerings
27.25 Rittal
27.25.1 Business Overview
27.25.2 Product Offerings
27.26 Toshiba
27.26.1 Business Overview

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27.26.2 Product Offerings
27.27 Trane (Ingersoll Rand)
27.27.1 Business Overview
27.27.2 Product Offerings
27.28 Tripp Lite
27.28.1 Business Overview
27.28.2 Product Offerings
27.28.3 Key News
27.29 Vertiv Group
27.29.1 Business overview
27.29.2 Product offerings
27.29.3 Key news
27.30 Yanmar (Himoinsa)
27.30.1 Business Overview
27.30.2 Product Offerings
27.31 Zincfive
27.31.1 Business Overview
27.31.2 Products Offerings

28 KEY CONSTRUCTION CONTRACTORS

28.1 Aecom
28.1.1 Business Overview
28.1.2 Service Offerings
28.2 Arup
28.2.1 Business Overview
28.2.2 Service Offerings
28.3 Balfour Beatty US
28.3.1 Business Overview
28.3.2 Service Offerings
28.4 Bluescope Construction
28.4.1 Business Overview
28.4.2 Service Offerings
28.5 Corgan
28.5.1 Business Overview
28.5.2 Service Offerings
28.6 Clune Construction
28.6.1 Business Overview
28.6.2 Service Offerings

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28.7 DPR Construction
28.7.1 Business Overview
28.7.2 Service Offerings
28.8 Fortis Construction
28.8.1 Business Overview
28.8.2 Service Offerings
28.9 Gensler
28.9.1 Business Overview
28.9.2 Service Offerings
28.10 Gilbane Building Company
28.10.1 Business Overview
28.10.2 Service Offerings
28.11 Fluor Corporation
28.11.1 Business Overview
28.11.2 Service Offerings
28.12 HDR Architecture
28.12.1 Business Overview
28.12.2 Service Offerings
28.13 Holder Construction Group
28.13.1 Business Overview
28.13.2 Product Offerings
28.14 HITT Contracting
28.14.1 Business Overview
28.14.2 Service Offerings
28.15 Hoffman Construction
28.15.1 Business Overview
28.15.2 Service Offerings
28.16 Jacobs Engineering Group
28.16.1 Business Overview
28.16.2 Service Offerings
28.17 JE Dunn Construction Group
28.17.1 Business Overview
28.17.2 Service Offerings
28.18 Linesight
28.18.1 Business Overview
28.18.2 Service Offerings
28.19 M+W Group (Exyte)
28.19.1 Business Overview
28.19.2 Service Offerings

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28.20 Morrison Hershfield
28.20.1 Business Overview
28.20.2 Service Offerings
28.21 Mortenson
28.21.1 Business Overview
28.21.2 Service Offerings
28.22 Rogers-O'Brien Construction
28.22.1 Business Overview
28.22.2 Service Offerings
28.23 Structure Tone (STO Building Group)
28.23.1 Business Overview
28.23.2 Service Offerings
28.24 Syska Hennessy Group
28.24.1 Business Overview
28.24.2 Service Offerings
28.25 The Walsh Group
28.25.1 Business Overview
28.25.2 Service Offerings
28.26 Turner Construction Company
28.26.1 Business Overview
28.26.2 Service Offerings
28.26.3 Key News

29 KEY DATA CENTER INVESTORS

29.1 Apple
29.1.1 Business Overview
29.1.2 Service Offerings
29.1.3 Key News
29.2 Amazon Web Services (AWS)
29.2.1 Business Overview
29.2.2 Service Offerings
29.2.3 Key News
29.3 Aligned
29.3.1 Business Overview
29.3.2 Service Offerings
29.4 Compass Datacenters
29.4.1 Business Overview
29.4.2 Service Offerings

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29.5 Cyrusone
29.5.1 Business Overview
29.5.2 Service Offerings
29.5.3 Key News
29.6 Copt Data Center Solutions
29.6.1 Business Overview
29.6.2 Service Offerings
29.7 Coresite Realty
29.7.1 Business Overview
29.7.2 Service Offerings
29.7.3 Key News
29.8 Databank
29.8.1 Business Overview
29.8.2 Service Offerings
29.9 Digital Realty
29.9.1 Business Overview
29.9.2 Service Offerings
29.10 Edgecore Internet Real Estate
29.10.1 Business Overview
29.10.2 Service Offerings
29.11 Equinix
29.11.1 Business Overview
29.11.2 Service Offerings
29.11.3 Key News
29.12 Facebook
29.12.1 Business Overview
29.12.2 Service Offerings
29.12.3 Key News
29.13 Flexential
29.13.1 Business Overview
29.13.2 Service Offerings
29.13.3 Key News
29.14 Fifteenfortyseven Critical Systems Realty
29.14.1 Business Overview
29.14.2 Service Offerings
29.14.3 Key News
29.15 GIGA Data Centers
29.15.1 Business Overview
29.15.2 Service Offerings

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29.16 Google
29.16.1 Business Overview
29.16.2 Service Offerings
29.17 H5 Data Centers
29.17.1 Business Overview
29.17.2 Service Offerings
29.17.3 Key News
29.18 Microsoft
29.18.1 Business Overview
29.18.2 Service Offerings
29.19 NTT Global Data Centers (Ragingwire Data Centers)
29.19.1 Business Overview
29.19.2 Service Offerings
29.20 Iron Mountain
29.20.1 Business Overview
29.20.2 Service Offerings
29.21 QTS Realty Trust
29.21.1 Business Overview
29.21.2 Service Offerings
29.21.3 Key News
29.22 Switch
29.22.1 Business Overview
29.22.2 Service Offerings
29.23 Stack Infrastructure
29.23.1 Business Overview
29.23.2 Service Offerings
29.23.3 Key News
29.24 Vantage Data Centers
29.24.1 Business Overview
29.24.2 Service Offerings

30 NEW ENTRANTS

30.1 Cirrus Data Services
30.1.1 Business Overview
30.1.2 Service Offerings
30.2 Novva
30.2.1 Busines Overview
30.2.2 Service Offerings

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30.3 PointOne
30.3.1 Business Overview
30.3.2 Service Offerings
30.4 Quantum LOOPHOLE
30.4.1 Business Overview
30.4.2 Service Offerings
30.5 Yondr
30.5.1 Business Overview
30.5.2 Service Offerings:
30.5.3 Key News

31 REPORT SUMMARY

31.1 Key Takeaways

32 QUANTITATIVE SUMMARY

32.1 US Data Center Market
32.1.1 Investment: Market Size & Forecast
32.1.2 Infrastructure: Market Size & Forecast
32.1.3 IT Infrastructure: Market Size & Forecast
32.1.4 Electrical Infrastructure: Market Size & Forecast
32.1.5 Mechanical Infrastructure: Market Size & Forecast
32.1.6 Cooling Systems: Market Size & Forecast
32.1.7 Cooling Technique: Market Size & Forecast
32.1.8 General Construction: Market Size & Forecast
32.2 Geographical Segmentation
32.2.1 Investment: Market Size & Forecast
32.2.2 Area: Market Size & Forecast
32.2.3 Power Capacity: Market Size & Forecast
32.3 South-Eastern US
32.3.1 Investment: Market Size & Forecast
32.3.2 Infrastructure: Market Size & Forecast
32.4 Western US
32.4.1 Investment: Market Size & Forecast
32.4.2 Infrastructure: Market Size & Forecast
32.5 South-Western US
32.5.1 Investment: Market Size & Forecast
32.5.2 Infrastructure: Market Size & Forecast

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32.6 Mid-Western US
32.6.1 Investment: Market Size & Forecast
32.6.2 Infrastructure: Market Size & Forecast
32.7 North-Eastern US
32.7.1 Investment: Market Size & Forecast
32.7.2 Infrastructure: Market Size & Forecast

33 APPENDIX

33.1 Abbreviations

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List Of Exhibits

LIST OF EXHIBITS

Exhibit 1 Segmentation of US Hyperscale Data Center Market
Exhibit 2 Market Size Calculation Approach 2020
Exhibit 3 Average Industrial Electricity Pricing 2020 (per kW)
Exhibit 4 Data Center Site Selection Criteria
Exhibit 5 Impact of Deployment of Microgrids in Hyperscale Data Centers
Exhibit 6 Usage of Microgrid in Data Centers
Exhibit 7 Impact of Innovative Data Center Technologies
Exhibit 8 Advantages of Usage of Software Defined Systems to Monitor the Infrastructure
Exhibit 9 Impact of AI Boosts Liquid Immersion & Direct-To-Chip Cooling Adoption
Exhibit 10 Impact of Innovative UPS Battery Technologies
Exhibit 11 TCO: VRLA vs Lithium-ion vs Nickle Zinc
Exhibit 12 Impact of Rising Procurement of Renewable Energy for Hyperscale Data Centers
Exhibit 13 Impact of Adoption of Hyperconverged & Converged Infrastructure Platforms
Exhibit 14 Impact of COVID-19 on Hyperscale Data Center Market
Exhibit 15 Impact of COVID-19 on US Hyperscale Data Center Market
Exhibit 16 Impact of 5G Deployment & Hyperscale Data Centers
Exhibit 17 Impact of Rising Investment in Hyperscale Data Centers
Exhibit 18 Hyperscale Investment in US Data Center Market in 2020 (Number of Projects)
Exhibit 19 Impact of Cloud & Connectivity Drive Demand for Hyperscale Data Centers
Exhibit 20 Impact of IoT & Big Data Drive Demand for Hyperscale Data Centers
Exhibit 21 Impact of M&As to Fuel Hyperscale Data Center Growth
Exhibit 22 Impact of Tax Incentives to Boost Hyperscale Investment
Exhibit 23 Impact of Location Constraints for Hyperscale Data Center Construction
Exhibit 24 Impact of Data Center Security Challenges
Exhibit 25 Impact of Dearth of Skilled Workforce
Exhibit 26 Impact of Increased Carbon Emissions from Data Centers
Exhibit 27 Impact of Increasing Water Consumption by Hyperscale Operators
Exhibit 28 Hyperscale Data Center Market in US 2020–2026 ($ billion)
Exhibit 29 Hyperscale Data Center Market in US by Area 2020–2026 (million square feet)
Exhibit 30 Hyperscale Data Center Market in US by Power Capacity 2020–2026 (MW)
Exhibit 31 Hyperscale Data Center IT Infrastructure Market in US 2020–2026 ($ billion)

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Exhibit 32 Hyperscale Data Center Support Infrastructure Market in US 2020–2026 ($ billion)
Exhibit 33 Five Forces Analysis 2020
Exhibit 34 Incremental Growth by Infrastructure 2020 & 2026
Exhibit 35 US Data Center Hyperscale IT Infrastructure Market 2020?2026 ($ billion)
Exhibit 36 US Data Center Hyperscale Electrical Infrastructure Market 2020?2026 ($ billion)
Exhibit 37 US Data Center Hyperscale Mechanical Infrastructure Market 2020?2026 ($ billion)
Exhibit 38 US Data Center Hyperscale General Construction Market 2020?2026 ($ billion)
Exhibit 39 Incremental Growth by IT Infrastructure 2020 & 2026
Exhibit 40 US Data Center Hyperscale Server Infrastructure Market 2020–2026 ($ billion)
Exhibit 41 US Data Center Hyperscale Storage Infrastructure Market 2020–2026 ($ billion)
Exhibit 42 US Data Center Hyperscale Network Infrastructure Market 2020?2026 ($ billion)
Exhibit 43 Incremental Growth by Electrical Infrastructure 2020 & 2026
Exhibit 44 US Data Center Hyperscale UPS Systems Market 2020?2026 ($ billion)
Exhibit 45 US Data Center Hyperscale Generators Market 2020?2026 ($ billion)
Exhibit 46 US Data Center Hyperscale Transfer Switches & Switchgears Market 2020?2026 ($ billion)
Exhibit 47 US Data Center Hyperscale PDUs Market 2020?2026 ($ billion)
Exhibit 48 US Data Center Hyperscale Other Power Infrastructure Market 2020?2026 ($ billion)
Exhibit 49 Incremental Growth by Mechanical Infrastructure 2020 & 2026
Exhibit 50 US Data Center Hyperscale Cooling Systems Market 2020?2026 ($ billion)
Exhibit 51 US Data Center Hyperscale Racks Market 2020–2026 ($ billion)
Exhibit 52 US Data Center Hyperscale Other Cooling Infrastructure Market 2020?2026 ($ billion)
Exhibit 53 Incremental Growth by Cooling Systems 2020 & 2026
Exhibit 54 US Data Center Hyperscale CRAC & CRAH Units Market 2020?2026 ($ billion)
Exhibit 55 US Data Center Chiller Units Market 2020?2026 ($ million)
Exhibit 56 US Data Center Hyperscale Cooling Towers & Dry Coolers Market 2020?2026 ($ billion)
Exhibit 57 US Data Center Hyperscale Economizers & Evaporative Coolers Market 2020?2026 ($ billion)

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Exhibit 58 US Data Center Hyperscale Other Cooling Units Market 2020?2026 ($ billion)
Exhibit 59 Incremental Growth by Cooling Technique 2020 & 2026
Exhibit 60 US Data Center Hyperscale Air-based Cooling Market 2020?2026 ($ billion)
Exhibit 61 US Data Center Hyperscale Liquid-based Cooling Market 2020?2026 ($ billion)
Exhibit 62 Incremental Growth by General Construction 2020 & 2026
Exhibit 63 US Hyperscale Data Center Market by Core & Shell Development 2020–2026 ($ billion)
Exhibit 64 US Data Center Hyperscale Market by Installation & Commissioning Services 2020–2026 ($ billion)
Exhibit 65 US Hyperscale Data Center Market by Building & Engineering Design 2020–2026 ($ billion)
Exhibit 66 US Data Center Hyperscale Market by Physical Security 2020–2026 ($ billion)
Exhibit 67 US Data Center Hyperscale Market by DCIM/BMS Solutions 2020–2026 ($ billion)
Exhibit 68 Incremental Growth by Geography 2020 & 2026
Exhibit 69 Incremental Growth by Area 2020 & 2026
Exhibit 70 Incremental Growth by Power Capacity 2020 & 2026
Exhibit 71 Hyperscale Data Center Market in South-Eastern US 2020–2026 ($ billion)
Exhibit 72 Hyperscale Data Center Market in US by Area 2020–2026 (million square feet)
Exhibit 73 Hyperscale Data Center Market in US by Power Capacity 2020–2026 (MW)
Exhibit 74 Hyperscale Data Center Support Infrastructure Market in US 2020–2026 ($ billion)
Exhibit 75 Hyperscale Data Center Market in South-Eastern US 2020–2026 ($ billion)
Exhibit 76 Hyperscale Data Center Market in US by Area 2020–2026 (million square feet)
Exhibit 77 Hyperscale Data Center Market in US by Power Capacity 2020–2026 (MW)
Exhibit 78 Hyperscale Data Center Support Infrastructure Market in US 2020–2026 ($ billion)
Exhibit 79 Hyperscale Data Center Market in South-Eastern US 2020–2026 ($ billion)
Exhibit 80 Hyperscale Data Center Market in US by Area 2020–2026 (million square feet)
Exhibit 81 Hyperscale Data Center Market in US by Power Capacity 2020–2026 (MW)
Exhibit 82 Hyperscale Data Center Support Infrastructure Market in US 2020–2026 ($ billion)
Exhibit 83 Hyperscale Data Center Market in South-Western US 2020–2026 ($ billion)
Exhibit 84 Hyperscale Data Center Market in South-Western US by Area 2020–2026

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(million square feet)
Exhibit 85 Hyperscale Data Center Market in South-Western US by Power Capacity 2020–2026 (MW)
Exhibit 86 Hyperscale Data Center Support Infrastructure Market in South-Western US 2020–2026 ($ billion)
Exhibit 87 Hyperscale Data Center Market in South-Eastern US 2020–2026 ($ billion)
Exhibit 88 Hyperscale Data Center Market in US by Area 2020–2026 (million square feet)
Exhibit 89 Hyperscale Data Center Market in US by Power Capacity 2020–2026 (MW)
Exhibit 90 Hyperscale Data Center Support Infrastructure Market in US 2020–2026 ($ billion)

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List Of Tables

LIST OF TABLES

Table 1 Key Caveats
Table 2 Currency Conversion 2013?2020
Table 3 M&A Activities in US in 2020
Table 4 US Hyperscale Data Center Market 2020?2026 ($ billion)
Table 5 US Hyperscale Data Center Market by Infrastructure 2020?2026 ($ billion)
Table 6 US Hyperscale Data Center Market by IT Infrastructure 2020?2026 ($ billion)
Table 7 US Hyperscale Data Center Market by Electrical Infrastructure 2020?2026 ($ billion)
Table 8 US Hyperscale Data Center Market by Mechanical Infrastructure 2020?2026 ($ billion)
Table 9 US Hyperscale Data Center Market by Cooling Systems 2020?2026 ($ billion)
Table 10 US Hyperscale Data Center Market by Cooling Technique 2020?2026 ($ billion)
Table 11 US Hyperscale Data Center Market by General Construction 2020?2026 ($ billion)
Table 12 US Hyperscale Data Center Market by Investment 2020?2026 ($ billion)
Table 13 US Hyperscale Data Center Market by Area 2020?2026 (million square feet)
Table 14 US Hyperscale Data Center Market by Power Capacity 2020?2026 (MW)
Table 15 South-Eastern US Hyperscale Data Center Market 2020?2026
Table 16 South-Eastern US Hyperscale Data Center Market 2020?2026 ($ billion)
Table 17 Western US Hyperscale Data Center Market 2020?2026
Table 18 Western US Hyperscale Data Center Market 2020?2026 ($ billion)
Table 19 South-Western US Hyperscale Data Center Market 2020?2026
Table 20 South-Western US Hyperscale Data Center Market 2020?2026 ($ billion)
Table 21 Mid-Western US Hyperscale Data Center Market 2020?2026
Table 22 Mid-Western US Hyperscale Data Center Market 2020?2026 ($ billion)
Table 23 North-Eastern US Hyperscale Data Center Market 2020?2026
Table 24 North-Eastern US Hyperscale Data Center Market 2020?2026 ($ billion)

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