

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

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## 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.

## 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

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

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

PDU's

Other Electrical Infrastructure

## Market Segmentation by Mechanical Infrastructure

Cooling Systems

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

## 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 Wiyynn (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.

## Key IT Infrastructure Providers

Arista Networks

AcceleStor

Atos

Broadcom

Cisco Systems

DataDirect Networks

Dell Technologies

Extreme Networks

Fujitsu

Hewlett Packard Enterprise (HPE)

Hitachi Vantara

Huawei Technologies

IBM

Intel Technologies

Infotrend Technology

Inspur

MiTAC Holdings

NetApp

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



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

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

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

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

## Vantage Data Centers

### New Entrants

Cirrus Data Services

Nowva

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?

## 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**

- 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

## **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



## 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

- 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**

- 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

## **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 Acclstor

#### 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

**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

- 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 Wiyynn (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

- 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

- 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



- 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

- 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

- 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

- 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

## 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 Business Overview

30.2.2 Service Offerings

### 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

## 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

## 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)



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)

- 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

(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)

## 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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