Global Hyperscale Data Center Market 2023

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Abstracts

The global hyperscale data center market is projected to grow over 4.1% CAGR from 2023 to 2029, reaching USD 134.2 billion. This growth is driven by digitalization, internet reliance, and increased data generation. Despite COVID-19, the industry continues to expand, with sustainability and AI adoption playing a significant role. Innovative power solutions and IT infrastructure trends are also observed.

The report covers market size and growth, segmentation, trends and strategies for global hyperscale data center market. It presents a quantitative analysis of the market to enable stakeholders to capitalize on the prevailing market opportunities. The report also identifies top segments for opportunities and strategies based on market trends and leading competitors' approaches.

Market Segmentation
The market is segmented based on various factors, including IT infrastructure, electrical infrastructure, mechanical infrastructure, cooling system, cooling technique, general construction, geography.

Segmentation by Infrastructure
IT Infrastructure
 - Server
 - Storage
 - Network
Electrical Infrastructure
 - UPS Systems
 - Generators
 - Transfer Switches & Switchgears
 - PDUs
 - Others

Mechanical Infrastructure
 - Cooling Systems (CRAC & CRAH Units, Chiller Units, Cooling Towers, Condensers & Dry Coolers, Economizers & Evaporative Coolers, Others)
 - Racks
 - Others
General Construction
 - Core & Shell Development
 - Installation & Commissioning Services
 - Building & Engineering Design
 - Physical Security
 - DCIM/BMS

Segmentation by Cooling Technique
Air-Based Cooling Technique
Liquid-Based Cooling Technique

Segmentation by Geography
North America
Latin America
Western Europe
Nordic
Central & Eastern Europe
Middle East & Africa
APAC

HVO is replacing diesel fuel in European and US data centers, with Kao Data Centers, Ark Data Centers, and Interxion (Digital Realty) already making the switch in their generator systems.

Air-based cooling techniques, particularly CRAC and CRAH systems, dominate the global hyperscale data center market with a 31.4% market share in 2022.

The US and China dominate the hyperscale data center market. Major companies invest, including Facebook, Google, Microsoft, AWS, Alibaba, Tencent, and Baidu. Brazil, Mexico, and Chile lead in Latin America. Spain, Belgium, Norway, Sweden, Poland, Switzerland, Denmark, and Finland contribute in Europe. The Middle East sees development in Israel, Saudi Arabia, and the UAE. Africa shows potential, with South Africa leading the way.

Competitive Landscape

Key IT infrastructure providers: Arista Networks, Inc., Arista Networks, Inc., Atos SE, Broadcom Inc., Cisco Systems, Inc., Dell Technologies Inc., Extreme Networks, Inc., Fujitsu Limited, Hewlett Packard Enterprise Company (HPE), Hitachi, Ltd., Huawei Technologies Co., Ltd., IBM Corporation, INSPUR Co., Ltd., Inventec Corporation, Juniper Networks, Inc., Legend Holdings Corporation, Micron Technology, Inc., Milestone Systems A/S (Pivot3), MiTAC Holdings Corporation, NetApp, Inc., Nimbus Data, Inc., Oracle Corporation, Pure Storage, Inc., QCT Inc., Seagate Technology Holdings plc, Super Micro Computer, Inc. dba Supermicro, Synology Inc., Toshiba Corporation, Western Digital Corporation, and Wiwynn Corporation.

Key support infrastructure providers: 3M Company, ABB Ltd., Airedale International Air Conditioning Ltd., Alfa Laval AB, Asetek A/S, Assa Abloy AB, Carrier Global Corporation, Caterpillar Inc., Condair Group AG, Cummins Inc., Daikin Industries, Ltd., Data Aire, Inc., Delta Electronics, Inc., Eaton Corporation plc, Generac Holdings Inc., Green Revolution Cooling, Inc., HITEC Power Protection B.V., Honeywell International, Inc., Johnson Controls International PLC, Kohler Co., Langley Holdings plc (Piller Power Systems Inc.), Legrand SA, Mitsubishi Electric Corporation, Munters Europe AB, Panduit Corp., Riello Elettronica S.p.A., Rittal GmbH & Co. KG., Rolls-Royce Holdings plc, Schneider Electric SE, Siemens AG, STULZ GMBH, Trane Technologies plc, Vertiv Holdings Co., Yanmar Co., Ltd., and ZincFive, Inc.

Key construction contractors: AECOM Technology Corporation, Arthur Gensler Jr. & Associates, Inc., Arup Group Limited, Aurecon Group Pty. Ltd., Benthem Crouwel Architekten B.V., Bouygues S.A., Cap Ingelec SAS, Corgan Associates, Inc., Dar Al-Handasah Consultants Shair and Partners Holdings Limited, Deerns Groep B.V., DPR Construction, DSCO Group Pte. Ltd., Edarat Group, Fluor Corporation, Fortis Construction Inc., Gilbane Building Company, HDR, Inc., Holder Construction Company, ISG Ltd., Jacobs Solutions Inc., Kirby Group Engineering Ltd., KKCG SE, Koninklijke HaskoningDHV Groep B.V., Laing O'Rourke PLC, Larsen & Toubro Ltd., M+W Group GmbH, Mace Group Ltd, Mercury Engineering B.V., Millfont Limited (Linesight), Morrison Hershfield Group Inc, NTT Facilities Inc., SH Group, Inc., SNC-Lavalin Group Inc., Sterling and Wilson Pvt. Ltd., STO Building Group Inc., Turner Construction Company, and Winthrop Engineering and Contracting Ltd.

Key data center investors: Apple, AWS (Amazon Web Services), CyrusOne, Digital Realty, Equinix, Facebook (META), Google, Keppel Data Centres, Microsoft, NTT Global Data Centers (NTT Communications), ST Telemedia Global Data Centres, Vantage Data Centers, 21Vianet - (Century Internet Data Center), Africa Data Centres,

Bharti Airtel, AirTrunk Operating, Aligned, atNorth, Beyond.pl, Big Data Exchange, Bridge Data Centres, Canberra Data Centers, Chayora, Chindata, CloudHQ, ClusterPower, Cologix, Compass Datacenters, COPT Data Center Solutions, CoreSite Realty, DataBank, DATA4, DigiPlex (IPI Partners), EdgeConneX, Etisalat Group, Flexential, GDS Services, Global Switch, Green Mountain, Gulf Data Hub, HostDime, InterNexa, Iron Mountain, IXAfrica, IXcellerate, Moro Hub, NEXTDC, ODATA, Ooredoo, Orange Business Services, Paratus Namibia, QTS Realty Trust, Raxio Group, Rostelecom Data Centers, Scala Data Centers, Sify Technologies, SUNeVison, Tenglong Holdings Group, Telecom Egypt, T5 Data Centers, Turkcell, Wingu, Yondr, Yotta Infrastructure Solutions.

This report profiles key new entrants in the hyperscale data center market, including Adani Group, Cirrus Data Solutions Inc., Data Center First PTE. Ltd., GTR Management Services Limited, Hickory Group, KevlinX HoldCo, Novva Data Centers Holdings, LLC, and Quantum Loophole, Inc.

Scope of the Report
To analyze and forecast the market size of the global hyperscale data center market.
To classify and forecast the global hyperscale data center market based on infrastructure, cooling technique, geography.
To identify drivers and challenges for the global hyperscale data center market.
To examine competitive developments such as mergers & acquisitions, agreements, collaborations and partnerships, etc., in the global hyperscale data center market.
To identify and analyze the profile of leading players operating in the global hyperscale data center market.

Why Choose This Report
Gain a reliable outlook of the global hyperscale data center market forecasts from 2023 to 2029 across scenarios.
Identify growth segments for investment.
Stay ahead of competitors through company profiles and market data.
The market estimate for ease of analysis across scenarios in Excel format.
Strategy consulting and research support for three months.
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