

Data Center Substation Market Size, Share & Trends Analysis Report By Component, By Voltage Type (33kV - 110kV, 110kV - 220kV, 220kV - 500kV, Above 500kV), By Region, And Segment Forecasts, 2021 - 2030

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Abstracts

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Data Center Substation Market Growth & Trends

The global data center substation market size is expected to reach USD 14.80 billion by 2030, registering a CAGR of 5.6% from 2021 to 2030, according to a study conducted by Grand View Research, Inc. Data centers are a vital part of the IT infrastructure of the digitized society. New data-intensive technologies and high-speed wireless networks have led to an increased demand for data centers among businesses of all sizes, right from major electricity-intensive industries to limited enterprise computing centers.

Amidst the COVID-19 pandemic, the exponential rise in data generated and consumed by various individuals and organizations has led to the surge in demand for data storage, resulting in the rising number of reliable and efficient data centers. Globally, data centers are evolving as computational hubs for several enterprises and end users with the increasing number of work-from-home jobs. As a result, the unprecedented rise in data generation and the need to improve the performance of data centers have boosted the demand for constructing new data centers and restoring the existing ones. Thus, an increase in the number of data center restoration and construction projects is likely to provide growth avenues for the market in near future.

The rising demand for electrical power systems that are smart, automated, and can help

reduce the carbon footprint serves as a catalyst for advancements in the market. Substations with Gas Insulated Switchgear (GIS) are unrivaled in terms of reliability, compactness, efficiency, safety, and providing maximum power availability. Their low maintenance and robust design help minimize the substation footprint. Though GIS substations have a high initial cost, they have a longer lifecycle and require minimum maintenance, serving to reduce lifecycle operating expenses while maximizing the availability of power from the substation. Recent developments in key substation components, such as power transformers, gas-insulated switchgear, fiber-optic current sensors, and high-voltage circuit breakers, have enabled their digitization and moved into the digital age.

For instance, in March 2020, ABB introduced a purpose-built substation to offer tailored solutions to the rapidly growing data center industry. The substation is designed to be safe and highly reliable while enabling efficient operation and maintenance during the entire lifecycle. The new substation is around 30% smaller in size and utilizes 50% lesser copper on control cables. The substation replaces copper cables with fiber optics and reduces the physical connections through digitization. The rising focus on the replacement of old electrical substation infrastructure with upgraded, high-quality, modular, digital, and gas-insulated systems is also expected to augment the market growth.

Data Center Substation Market Report Highlights

The switchgear segment held the largest market share in 2020 and is expected to register the fastest growth of CAGR 7.1% over the forecast period owing to the rising data center construction activities worldwide

The Gas Insulated Switchgear (GIS) sub-segment held the largest share in the switchgear segment. The rising energy demand and replacement of conventional switchgear at data center substations are driving the demand for gas-insulated switchgear

In 2020, the above 500kV segment accounted for the largest market share, capturing over 38.8% of the overall demand. A rise in demand for medium to high voltage substations played a pivotal role in driving the demand for this segment

North America emerged as a market leader and accounted for 38.0% of the global revenue share in 2020, owing to the presence of data-intensive

incumbents as well as start-ups in the region. The region boasts a large number of data center constructions, which, in turn, is increasing the demand for energy-efficient data center substations

Asia Pacific is anticipated to emerge as the fastest-growing region over the forecast period.

The global market is characterized by intense competition among established players such as Eaton; Siemens Energy; Schneider Electric; General Electric; and Hitachi ABB Powergrids Inc. Key market players are focused on introducing technologically advanced products to cater to the market demands

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