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Global AC Rack Power Distribution Unit (rPDU) for Data Centers Market Growth 2026-2032

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Abstracts

The global AC Rack Power Distribution Unit (rPDU) for Data Centers market size is predicted to grow from US$ 2720 million in 2025 to US$ 5019 million in 2032; it is expected to grow at a CAGR of 9.3% from 2026 to 2032.

AC Rack Power Distribution Units (rPDUs) for Data Centers are rack-level electrical distribution devices designed to receive AC power from upstream data center power infrastructure and distribute it to servers, storage systems, network equipment, and other IT loads within an individual rack. The product typically integrates an AC input connection, internal conductors or bus structures, multiple output receptacles, circuit protection, and, depending on configuration, metering, monitoring, communications, and outlet-level switching functions. This study focuses on independently commercialized AC rack PDUs used in data centers, covering Basic Rack PDU, Metered Rack PDU, Monitored Rack PDU, and Switched Rack PDU configurations. Products are commonly deployed in vertical 0U or horizontal rack-mount formats and are offered across single-phase and three-phase electrical architectures with different current ratings, outlet configurations, and management capabilities.

Key Findings

Basic Rack PDUs remain important in cost-sensitive installations, while intelligent configurations are taking a larger role in mission-critical environments

Metered and Monitored Rack PDUs are increasingly selected where operators require real-time visibility into rack-level power consumption

Switched Rack PDUs provide the highest functional integration among the four defined

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segments through remote outlet control and power management

High-density computing is accelerating demand for higher-current three-phase rPDUs, with leading suppliers expanding products beyond traditional rack power levels

Recent product development is increasingly focused on outlet density, cybersecurity, power-quality monitoring, and flexible input architectures

Market Trends

The AC rack PDU market is moving from conventional rack-level power distribution toward higher-density, more measurable, remotely manageable, and digitally connected power infrastructure. Rising processor and accelerator density is increasing the electrical load handled by individual racks, encouraging suppliers to expand three-phase configurations, higher-current input options, compact outlet layouts, and hybrid receptacle designs. Schneider Electric has expanded its NetShelter Rack PDU portfolio for high-density AI environments, while Vertiv introduced PowerIT rPDUs rated up to 57.6 kW for AI and HPC deployments in 2025. At the same time, intelligence is extending beyond basic current measurement toward outlet-level power monitoring, waveform and power-quality visibility, remote switching, environmental sensing integration, secure network communications, and connection with broader infrastructure management platforms. This evolution increases the strategic value of Monitored and Switched Rack PDUs while raising requirements for firmware reliability, cybersecurity, sensor accuracy, and lifecycle software support.

Market Dynamics

Drivers

Growth in computing intensity is increasing the importance of rack-level power distribution capacity, visibility, and reliability. Enterprise digitalization, private cloud infrastructure, telecommunications networks, financial computing, and government IT modernization are expanding the quantity and electrical density of critical IT racks. AI and accelerated computing further amplify this effect by creating larger and more dynamic power loads at the rack level. Operators increasingly require accurate load information to prevent circuit overloads, improve capacity utilization, balance phases, and maintain uptime, supporting migration from basic power strips toward purpose-built Metered, Monitored, and Switched rPDUs. Leading manufacturers are responding with higher-capacity products and expanded monitoring functions designed for dense

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computing environments.

Restraints

The principal restraint is the widening price and complexity gap between Basic Rack PDUs and intelligent rPDUs. Adding precision meters, embedded controllers, communication modules, outlet switching, secure firmware, environmental interfaces, and redundancy increases hardware cost and lifecycle management requirements. Customers operating lower-density enterprise or telecommunications racks may therefore continue to favor basic or locally metered configurations when remote management does not provide sufficient economic value. Differences in regional voltage systems, plugs, receptacles, certification requirements, rack layouts, and customer-specific electrical architectures also generate substantial SKU complexity and increase inventory, engineering, certification, and channel-management costs for global suppliers.

Opportunities

The strongest product opportunity lies in upgrading existing rack power infrastructure as IT loads become denser and more difficult to manage. Higher-current three-phase rPDUs, universal-input architectures, compact high-density outlets, outlet-level metering, remote switching, and advanced power-quality monitoring create opportunities to raise product value without changing the fundamental rack-level product boundary. Enterprise data centers deploying AI, accelerated analytics, and private cloud workloads are particularly relevant because existing rack electrical architectures may need significant upgrades. Product platforms that can be configured across multiple voltages, phases, outlet standards, and management requirements can also reduce deployment complexity for multinational customers. Server Technology, for example, offers PRO4X universal-input configurations supporting both single- and three-phase input cord options.

Challenges

The industry must balance rising power density with safety, reliability, cybersecurity, physical space limitations, and increasing configuration complexity. Higher current increases thermal and protection requirements, while greater digital connectivity creates additional cybersecurity obligations for products that historically functioned as passive electrical devices. Intelligent rPDUs also need accurate measurement, reliable firmware, long product support cycles, secure communications, and interoperability with data center management environments. At the same time, custom electrical requirements

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can fragment manufacturing volumes across many configurations. Suppliers therefore face a continuing challenge of providing application-specific flexibility while preserving manufacturing scale, certification efficiency, component availability, and consistent product quality.

Industry Chain Analysis

The upstream supply chain for AC rack PDUs consists primarily of electrical and electronic components such as plugs and input cables, IEC or regional receptacles, copper conductors and bus structures, circuit breakers and overcurrent protection devices, relays, current and voltage sensing components, metering ICs, embedded processors, communication modules, displays, connectors, sheet-metal or engineered polymer enclosures, and mounting hardware. Basic products derive a relatively larger proportion of their value from electrical architecture, outlet configuration, safety certification, and manufacturing quality, whereas Metered, Monitored, and Switched rPDUs contain progressively higher electronic, firmware, communication, and control content.

At the midstream level, manufacturers integrate electrical design, mechanical construction, protection, metering, embedded control, firmware, communications, testing, certification, and product configuration into finished rack PDUs. Downstream demand comes from enterprise, telecommunications, government and public-sector, financial-service, and other data center environments. Value creation is increasingly shifting from the physical distribution of electricity toward accurate measurement, remote visibility, outlet-level control, power-quality diagnostics, cybersecurity, and simplified deployment. As functional integration increases, product differentiation depends less solely on enclosure and outlet hardware and increasingly on measurement accuracy, controller capability, communications architecture, reliability, configuration flexibility, and software-supported lifecycle management.

Segment Insights

Basic Rack PDUs form the entry-level segment and primarily compete on reliable distribution, electrical configuration, safety compliance, outlet density, and cost. Metered Rack PDUs add local measurement capabilities that help users evaluate input load and capacity utilization without requiring extensive network management. These two categories remain relevant in standardized deployments where centralized remote control is not essential. Vertiv, for example, continues to commercialize both Basic and Metered configurations alongside more intelligent product families, reflecting the

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persistence of differentiated requirements across rack environments.

Monitored and Switched Rack PDUs represent the higher-value portion of the defined product structure. Monitored products extend visibility to remote power and environmental data, while Switched products further add controllable outlets, remote reboot capability, sequencing, load management, and related operational functions. These functions become increasingly important as rack density rises and on-site intervention becomes more costly. Product competition is therefore shifting toward measurement granularity, controller performance, cybersecurity, remote management, outlet design, redundancy, and integration with data center infrastructure management environments rather than simply increasing outlet count.

Downstream Market Opportunities

Enterprise data centers represent an important opportunity as private cloud, AI inference, analytics, and business-critical applications increase rack power requirements and make power visibility more valuable. Telecommunications data centers require reliable remote operation across geographically distributed facilities, supporting demand for monitored and switched functions that reduce physical intervention. Financial services place strong emphasis on uptime, power redundancy, operational visibility, and security, creating a favorable environment for higher-function rPDUs. Government and public-sector facilities generate demand where infrastructure resilience, equipment lifecycle, security, and standardized procurement are important. Across these applications, the most attractive opportunity is not simply growth in rack numbers but the upgrade of installed racks from basic distribution toward measurable, remotely managed, and higher-capacity power architectures.

Regional Insights

North America and Europe are among the most visible markets for early deployment of higher-capacity and intelligent rack power products, supported by dense enterprise computing environments, mature data center operations, and rapid adoption of AI and HPC infrastructure. Vertiv's 2025 high-density PowerIT expansion was introduced across North America and EMEA, while Schneider Electric launched its high-density rack and power distribution portfolio globally, illustrating the broadening commercial availability of higher-current rPDUs. European demand additionally places strong emphasis on energy visibility, equipment efficiency, standard compliance, and secure management functions.

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Asia-Pacific is important both as a manufacturing base and as an end market, with Delta Electronics, Cyber Power Systems, ATEN International and multiple Chinese suppliers participating in rack power distribution. Regional demand is diversified across enterprise, telecommunications, financial, public-sector, and other data center installations, while voltage standards, connector configurations, project specifications, and price sensitivity vary considerably between countries. This creates room for both global suppliers with broad certification portfolios and regional manufacturers with advantages in customization, local engineering support, supply responsiveness, and cost structure.

Competitive Landscape Analysis

The competitive landscape combines diversified global critical-infrastructure groups, specialist rack-power suppliers, and regional manufacturers. Schneider Electric SE, Vertiv Holdings Co., Legrand S.A., Eaton Corporation plc and RITTAL GmbH & Co. KG compete through broad data center infrastructure portfolios, global channels, certification coverage, and the ability to integrate rPDUs into wider rack and power architectures. Legrand's position is reinforced by its Raritan and Server Technology rack-power platforms, while the group continued to expand its data center and critical-power exposure through bolt-on acquisitions in 2026. Delta Electronics, Inc., Panduit Corp., Chatsworth Products, Inc., Cyber Power Systems, Inc., ATEN International Co., Ltd., Austin Hughes Electronics Ltd., Schleifenbauer Products B.V. and nVent Electric plc provide additional competition through power-management specialization, rack infrastructure integration, regional channel strength, and configurable product portfolios. Gowone Industry (Ganzhou) Co., Ltd., Guangzhou Yishu Internet of Things Co., Ltd. and TOWE strengthen the Chinese supply base, particularly in intelligent PDU configuration and localized delivery. Competitive differentiation is increasingly centered on higher current capability, three-phase architectures, outlet density, metering accuracy, remote switching, power-quality analytics, communications security, configuration flexibility, and compatibility with broader infrastructure management systems. Schneider Electric and Vertiv's recent expansion of high-density rPDU platforms, together with Legrand's continued development of PX4 and PRO4X intelligent rack power products, illustrates how competition is moving toward higher-value, software-enabled electrical hardware rather than conventional passive distribution alone.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “AC Rack Power Distribution

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Unit (rPDU) for Data Centers Industry Forecast" looks at past sales and reviews total world AC Rack Power Distribution Unit (rPDU) for Data Centers sales in 2025, providing a comprehensive analysis by region and market sector of projected AC Rack Power Distribution Unit (rPDU) for Data Centers sales for 2026 through 2032. With AC Rack Power Distribution Unit (rPDU) for Data Centers sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world AC Rack Power Distribution Unit (rPDU) for Data Centers industry.

This Insight Report provides a comprehensive analysis of the global AC Rack Power Distribution Unit (rPDU) for Data Centers landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on AC Rack Power Distribution Unit (rPDU) for Data Centers portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global AC Rack Power Distribution Unit (rPDU) for Data Centers market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AC Rack Power Distribution Unit (rPDU) for Data Centers and breaks down the forecast by Power Management Function Types, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global AC Rack Power Distribution Unit (rPDU) for Data Centers.

This report presents a comprehensive overview, market shares, and growth opportunities of AC Rack Power Distribution Unit (rPDU) for Data Centers market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Power Management Function Types:

Basic Rack PDU

Metered Rack PDU

Monitored Rack PDU

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Switched Rack PDU

Segmentation by Rated Input Current Types:

Low Current (<16 A)

Medium Current (16–32 A)

High Current (>32 A)

Segmentation by Mounting Configuration Types:

Vertical Rack PDU (0U)

Horizontal Rack PDU (1U–3U)

Segmentation by Application:

Enterprise Data Centers

Telecommunications Data Centers

Government and Public Sector Data Centers

Financial Services Data Centers

Others

This report also splits the market by region:

Americas

United States

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- Canada
- Mexico
- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel

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Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Schneider Electric SE

Vertiv Holdings Co.

Legrand S.A.

Eaton Corporation plc

RITTAL GmbH & Co. KG

Delta Electronics, Inc.

Panduit Corp.

Chatsworth Products, Inc.

Cyber Power Systems, Inc.

ATEN International Co., Ltd.

Austin Hughes Electronics Ltd.

Schleifenbauer Products B.V.

nVent Electric plc

Gowone Industry (Ganzhou) Co., Ltd.

Guangzhou Yishu Internet of Things Co., Ltd.

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TOWE

Key Questions Addressed in this Report

What is the 10-year outlook for the global AC Rack Power Distribution Unit (rPDU) for Data Centers market?

What factors are driving AC Rack Power Distribution Unit (rPDU) for Data Centers market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do AC Rack Power Distribution Unit (rPDU) for Data Centers market opportunities vary by end market size?

How does AC Rack Power Distribution Unit (rPDU) for Data Centers break out by Power Management Function Types, by Application?

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