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Global Data Center PDU (Power Distribution Unit) Market Growth 2026-2032

https://marketpublishers.com/r/G401E4850CB0EN.html
Date: October 2026
Pages: 144
Price: US$ 3,660.00 (Single User License)
ID: G401E4850CB0EN

Abstracts

The global Data Center PDU (Power Distribution Unit) 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.

Data Center PDU (Power Distribution Unit), within the scope of this study, refers primarily to rack-level power distribution units installed in or adjacent to data center IT cabinets to distribute upstream AC power to servers, storage systems, network equipment and other rack-mounted loads. The products are typically configured in 0U vertical, 1U, 2U or other rack-compatible formats and are specified according to input voltage, single- or three-phase architecture, rated current, power capacity, outlet type and quantity, branch protection, metering capability, communication interfaces and remote-control functionality. The confirmed product structure covers Basic Rack PDU, Metered Rack PDU, Monitored Rack PDU and Switched Rack PDU, ranging from conventional power distribution to increasingly granular measurement, remote monitoring and outlet-level switching. Higher-function configurations may integrate high-density C13/C19 or combination outlets, locking mechanisms, environmental sensors, hot-swappable network controllers, SNMP/API connectivity and interfaces with DCIM platforms. The market primarily serves enterprise, telecommunications, government and public-sector, financial-services and other data center environments requiring reliable rack-level power delivery, load management, energy visibility and operational control.

Key Findings

AI and accelerated computing are increasing rack power density and strengthening demand for higher-capacity intelligent Data Center PDUs

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Monitored and Switched Rack PDUs are gaining importance as operators require granular power visibility remote control and stronger operational resilience

Three-phase power universal input architectures and higher outlet density are becoming core design priorities for next-generation rack infrastructure

The IEA estimates global data center electricity consumption at around 415 TWh in 2024 with AI accelerating future infrastructure requirements

Vertiv expanded its PowerIT Rack PDU portfolio to ratings up to 57.6 kW in September 2025 for AI and HPC deployments

Market Trends

The Data Center PDU market is moving from passive rack-level power distribution toward intelligent, higher-density and software-connected power infrastructure. The most significant structural change is the rise in electrical demand per rack associated with GPU servers, AI accelerators and high-performance computing. This is increasing the importance of three-phase input, higher-current architectures, greater outlet density, phase balancing and more sophisticated branch protection. At the same time, operators are shifting from simple inlet metering toward branch- and outlet-level measurement, remote switching, threshold alarms, environmental sensing and integration with DCIM or broader infrastructure-management systems. Product design is also becoming more standardized across regions through universal-input architectures and combination outlets capable of supporting several server connector formats. Legrand’s Server Technology PRO4X platform illustrates the higher-intelligence direction through ±0.5% inlet- and outlet-level metering, power-quality metrics and hybrid outlet technology, while Eaton’s current Rack PDU G4 platform emphasizes high-density configurations, cybersecurity and global deployment flexibility. The long-term direction is therefore toward Rack PDUs acting as intelligent endpoints of the data center electrical architecture, supporting power distribution, capacity planning, energy management and remote operations within one device layer.

Latest Developments / News

Recent industry activity has concentrated on high-density power delivery, global deployment flexibility and deeper rack-level intelligence. In September 2025, Vertiv expanded the PowerIT Rack PDU family to ratings up to 57.6 kW, with Basic, Monitored and Switched models for North America and EMEA and three-phase architectures

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aimed at AI and HPC racks. During 2026, Eaton strengthened the Rack PDU G4 platform and continued promoting HDX models reaching up to 46 kW for GPU-intensive infrastructure, while emphasizing upgraded network modules and cybersecurity. On February 26, 2026, Chatsworth Products launched eConnect Universal Input PDUs using detachable input cords for mixed-voltage and multi-region environments, with configurations up to 34.5 kW and integrated environmental-monitoring options. In July 2026, Panduit launched the ES2P managed Rack PDU with Gigabit Ethernet, daisy chaining for up to 16 PDUs per IP address, ±2% metering accuracy and a hot-swappable controller. In parallel, the European Commission advanced work in 2026 on an EU-wide data center rating scheme and minimum performance standards, further reinforcing demand for measurable and digitally managed infrastructure. These developments indicate that industry innovation is increasingly concentrated in higher electrical capacity, standardized deployment, cybersecurity, monitoring granularity and software-enabled management rather than expansion of basic outlet-only products.

Market Dynamics

Drivers

The fundamental growth driver is expansion of computing capacity combined with rapidly increasing rack-level power requirements. The IEA estimates that data centers consumed around 415 TWh of electricity globally in 2024 and projects substantially higher demand through 2030, with accelerated servers driven largely by AI adoption contributing a major share of incremental electricity consumption. As more compute is concentrated within each rack, data center operators require higher-capacity PDUs, more accurate measurement, stronger branch protection and better three-phase load management. Operational reliability provides a second driver: failure or overload at rack level can affect increasingly valuable servers and accelerators, raising the economic value of real-time current, voltage, power and energy monitoring. Energy-efficiency requirements reinforce this trend. China’s 2025 national green data center evaluation framework requires continued optimization of power distribution and intelligent system-operation strategies, while European data center energy-performance reporting is increasing the importance of reliable power data throughout the facility.

Restraints

The most immediate restraint is the higher acquisition and integration cost of intelligent Rack PDUs compared with Basic Rack PDUs. Metering circuits, processors, network modules, switching relays, environmental sensors, cybersecurity functionality and

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management software increase hardware value but also raise installation, configuration and lifecycle-management requirements. In existing data centers, multiple voltage systems, connector formats, cabinet designs and generations of IT hardware can make large-scale PDU standardization difficult. High-density installations introduce additional electrical-design constraints related to cable routing, connector temperature rise, branch protection, redundancy and phase balancing. Network-connected PDUs also become part of the cybersecurity perimeter, requiring secure firmware, authentication, encrypted communication and controlled access. Because the PDU is the final distribution layer immediately upstream of critical IT equipment, data center customers generally place a high priority on proven reliability, safety certification and long support cycles, which can slow replacement of installed products even when newer intelligent systems offer greater functionality.

Opportunities

The clearest product-upgrade opportunity is migration from Basic and Metered Rack PDUs toward Monitored and Switched Rack PDUs. Outlet-level or branch-level measurement enables more precise capacity planning, while remote switching supports server reboot, startup sequencing, power isolation and control of unused outlets without requiring physical rack access. These functions become more valuable as operators manage larger numbers of racks, distributed sites and higher-value IT loads. AI infrastructure creates an additional opportunity for high-current three-phase systems: Vertiv's expansion to 57.6 kW, Eaton's HDX range up to 46 kW and Chatsworth Products' universal-input configurations up to 34.5 kW demonstrate the industry's movement toward substantially higher rack-level power delivery. Universal-input designs, hybrid outlets and configurable architectures can also reduce SKU inventories and simplify multinational deployments. Environmental sensor integration, APIs, DCIM interoperability, hot-swappable network controllers and stronger cybersecurity provide further opportunities to increase product value while creating closer integration between Rack PDUs and the broader data center management ecosystem.

Challenges

The industry's longer-term challenge is keeping PDU architecture aligned with rapidly changing server power requirements. GPU and accelerator generations can materially alter rack power density, connector requirements and redundancy strategies within relatively short equipment cycles, creating a risk that installed PDUs reach their electrical limits before the surrounding rack infrastructure reaches end of life. Increasing current density also raises requirements for connector reliability, thermal performance, cable retention and phase balancing. A second challenge is preserving the fundamental

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reliability of power distribution while adding more software and network functionality. Intelligent PDUs increasingly rely on embedded processors, Ethernet connectivity and upgradeable firmware, making cybersecurity and software lifecycle management part of the product specification. Manufacturers must therefore enable firmware and control-module maintenance with minimal risk to connected loads, encouraging hot-swappable controllers and stronger hardware-based security. International suppliers must additionally manage differences in input voltages, plug standards, safety certification and customer specifications across markets, while regional suppliers face increasing pressure to match global vendors in management software, security and after-sales support.

Industry Chain Analysis

The upstream Data Center PDU industry includes copper conductors and busbars, power cords, plugs and receptacles, circuit breakers and fuses, relays, switching components, metal or aluminum housings, current and voltage sensors, metering ICs, microprocessors, network controllers, displays, communication modules and environmental sensors. Product cost and value content differ significantly by intelligence level. Basic Rack PDUs derive a larger share of value from conductors, connectors, circuit protection, mechanical structure and regulatory certification. Metered, Monitored and Switched Rack PDUs progressively incorporate higher electronic and software content through metering circuits, processing hardware, communications, switching relays, cybersecurity functions and sensor interfaces. High-power products further require components rated for greater current, optimized internal thermal design and more compact outlet structures.

Midstream manufacturers integrate these components through electrical design, busbar and enclosure assembly, PCB integration, outlet configuration, firmware development, calibration, safety testing, certification and customized configuration. Value creation rises as products move from Basic to Metered, Monitored and Switched architectures because metering accuracy, software interoperability, network security and remote control become more important differentiators. Downstream customers comprise enterprise, telecommunications, government and public-sector, financial-services and other data centers, where Rack PDUs connect upstream UPS, busway or branch-circuit infrastructure to individual IT devices. As rack density increases, suppliers with both electrical engineering capability and software-management expertise gain additional value from monitoring, lifecycle services, cybersecurity updates and integration with broader infrastructure platforms.

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Segment Insights

Basic Rack PDU remains relevant in environments where reliable and economical power distribution is the primary requirement and energy monitoring is already performed at upstream electrical levels. This segment retains a role in conventional enterprise racks, smaller server rooms and cost-sensitive installations. Metered Rack PDU adds local or network-accessible electrical measurement and supports basic load balancing, capacity planning and overload prevention. As rack density increases, the ability to verify actual electrical loading is increasingly becoming a baseline requirement in professionally managed data centers.

Monitored Rack PDU and Switched Rack PDU represent the higher-value direction of the confirmed market structure. Monitored products provide remote access to electrical parameters and increasingly support threshold alarms, environmental sensors and DCIM integration. Switched products further add outlet- or circuit-level control for remote reboot, power sequencing and selective load management. Current offerings from Schneider Electric SE, Vertiv Holdings Co., Eaton Corporation plc, Cyber Power Systems, Inc. and ATEN International Co., Ltd. demonstrate the movement toward more granular control and networked rack infrastructure. High-density AI installations are likely to strengthen this product-mix transition because the operational impact of overload, phase imbalance or unplanned downtime rises as more computing capacity is concentrated within each rack. The segmentation used in this study remains Basic, Metered, Monitored and Switched Rack PDUs.

Downstream Market Opportunities

Enterprise Data Centers represent an important combination of new-build, server-refresh and infrastructure-modernization demand. Private cloud, AI, analytics and mission-critical applications can require PDU replacement when existing products no longer provide sufficient capacity, outlet density or monitoring functionality. Telecommunications Data Centers create particularly strong demand for remote monitoring and switching because network infrastructure is distributed across central facilities, edge sites and communications rooms where reducing on-site intervention has clear operational value. Government and Public Sector Data Centers emphasize reliability, cybersecurity, controlled access and energy management, while Financial Services Data Centers require high availability and traceable operation for transaction, payment and risk-management infrastructure. Across these applications, future demand is likely to come from both new rack deployments and replacement of installed Basic PDUs during server-density upgrades. The broader AI and data center investment cycle

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therefore supports Rack PDU demand through higher compute capacity per rack as well as growth in the total installed rack base.

Regional Insights

North America remains one of the most important markets for advanced Data Center PDUs because the United States is experiencing rapid expansion of cloud and AI infrastructure. The IEA expects data centers to contribute roughly half of U.S. electricity-demand growth through 2030, highlighting the scale of computing-capacity investment and the associated need for high-density electrical infrastructure. North America also has a broad ecosystem of global infrastructure vendors and specialized rack-power suppliers, supporting relatively fast commercialization of high-current, monitored and switched products.

Europe combines a mature data center base with increasingly formalized energy-performance requirements. During 2026, the European Commission continued developing a common rating scheme and minimum performance standards for data centers, building on existing energy-performance reporting requirements. This strengthens the value of accurate energy measurement and digital monitoring throughout the power chain, including at rack level. Asia-Pacific is driven by cloud, telecommunications, AI computing and broader digital infrastructure investment. China’s green data center framework specifically emphasizes continued optimization of supply and distribution systems and intelligent operating strategies, supporting higher-efficiency and more measurable rack power infrastructure. Regional supply is also diversified through confirmed participants including Delta Electronics, Inc., Cyber Power Systems, Inc., ATEN International Co., Ltd. and mainland Chinese suppliers, creating increasing competition between global brands and localized manufacturing.

Competitive Landscape Analysis

The Data Center PDU market features competition among global critical-infrastructure groups, specialist rack-power vendors and regional manufacturers. The confirmed competitive set includes 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 and three confirmed mainland Chinese suppliers. Schneider Electric SE positions Rack PDUs within its broader APC NetShelter and EcoStruxure architecture; its 2025 NetShelter Rack PDU Advanced update increased suitability for high-current AI servers

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and strengthened security and EcoStruxure IT integration. Vertiv Holdings Co. combines Rack PDU products with UPS, thermal management and broader critical digital infrastructure, while its September 2025 PowerIT expansion to 57.6 kW strengthened its offering for high-density AI and HPC racks. Legrand S.A. differentiates through Server Technology and advanced power-quality monitoring, including ±0.5% metering and hybrid outlets. Eaton Corporation plc increasingly emphasizes G4 platform cybersecurity, universal deployment and HDX high-density products.

Recent launches by Chatsworth Products, Inc. and Panduit Corp. further indicate that product competition is shifting toward deployment flexibility and intelligent management rather than simply outlet count. Chatsworth Products' 2026 Universal Input platform addresses mixed-voltage and multi-region deployments, while Panduit's ES2P adds Gigabit networking, expanded daisy chaining and hot-swappable management. RITTAL GmbH & Co. KG and nVent Electric plc can leverage broader rack and enclosure infrastructure positions, while Delta Electronics, Inc. integrates rack distribution with a wider data center power portfolio. Cyber Power Systems, Inc., ATEN International Co., Ltd., Austin Hughes Electronics Ltd. and Schleifenbauer Products B.V. add competition in monitored and switched configurations, while Gowone Industry (Ganzhou) Co., Ltd., Guangzhou Yishu Internet of Things Co., Ltd. and TOWE support localized supply in China. Future competition is likely to center on high power capacity, outlet density, metering accuracy, universal connectivity, remote switching, cybersecurity, environmental sensing, DCIM interoperability and the ability to adapt quickly to evolving AI rack architectures.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the "Data Center PDU (Power Distribution Unit) Industry Forecast" looks at past sales and reviews total world Data Center PDU (Power Distribution Unit) sales in 2025, providing a comprehensive analysis by region and market sector of projected Data Center PDU (Power Distribution Unit) sales for 2026 through 2032. With Data Center PDU (Power Distribution Unit) sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Data Center PDU (Power Distribution Unit) industry.

This Insight Report provides a comprehensive analysis of the global Data Center PDU (Power Distribution Unit) 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

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a focus on Data Center PDU (Power Distribution Unit) portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Data Center PDU (Power Distribution Unit) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Data Center PDU (Power Distribution Unit) 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 Data Center PDU (Power Distribution Unit).

This report presents a comprehensive overview, market shares, and growth opportunities of Data Center PDU (Power Distribution Unit) 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

Switched Rack PDU

Segmentation by Rated Input Current Types:

Low Current (<16 A)

Medium Current (16–32 A)

High Current (>32 A)

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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

Canada

Mexico

Brazil

APAC

China

Japan

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- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- 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

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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.

TOWE

Key Questions Addressed in this Report

What is the 10-year outlook for the global Data Center PDU (Power Distribution Unit) market?

What factors are driving Data Center PDU (Power Distribution Unit) market growth, globally and by region?

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

How do Data Center PDU (Power Distribution Unit) market opportunities vary by end market size?

How does Data Center PDU (Power Distribution Unit) break out by Power Management Function Types, by Application?

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