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North America HVAC Contained Server Market by Form Factor (Below 20 U, 20 to 40 U, Above 40 U), Cooling Capacity (Below 6,000 BTU, 6,000 to 10,000 BTU, Above 10,000 BTU), Organization Size, Vertical, and Country - Forecast to 2022

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Abstracts

Factors such as exponential increase in server rack densities and the need to eliminate overcooling are driving the North America HVAC contained server market

The North America Heating, Ventilation, and Air Conditioning (HVAC) contained server market size is expected to grow from USD 634.8 million in 2017 to USD 1,540.4 million by 2022, at a Compound Annual Growth Rate (CAGR) of 19.4%. The market is driven by factors, such as proliferation of Small and Medium-sized Enterprises (SMEs) and startups; significant cost savings achieved by server owners; and rapid deployment and construction period. However, HVAC contained server vendors face various obstacles, such as less awareness about the technology and manufacturing the HVAC contained server cabinets according to varying rack size and volume.

Above 40 U form factor is expected to have the fastest growth rate during the forecast period

There has been an increasing demand for servers that support high-intensity computing, specifically for Internet of Things (IoT) and edge computing. In addition, with the rapid growth in data and server traffic, mobile devices, and social media among customers, the demand for efficiently cooled servers has grown exponentially. They are scalable servers, providing high performance for mission-critical applications. As they are high-end systems providing excellent performance, the cooling needs of these servers are also greater compared to lesser Rack Unit (RU) servers.

Below 6,000 BTU cooling capacity is expected to have the largest market share during the forecast period

This range of cooling capacity has a low power requirement, and hence is more economical. This cooling capacity is ideal for deployment in small-sized businesses. The HVAC contained servers with a cooling capacity of less than 6,000 BTU have easy mobility and can be run using Uninterrupted Power Supply (UPS), in case of any power outage.

Canada is projected to grow at the highest CAGR during the forecast period

Among the countries taken into consideration for the study, Canada is expected to witness the highest CAGR during the forecast period. The ever-increasing internet penetration, due to improvement in wireless infrastructure, is expected to drive the demand for HVAC contained servers. With more and more businesses in Canada coming online, these businesses would require local data storage systems with inbuilt cooling solutions, which would be effectively catered to by HVAC contained server vendors. The country's various government initiatives for startups, along with the existence of world-class universities, have created a successful startup ecosystem in Canada. SMEs are responsible for employing more than 90% of Canada's workforce, and the SME's contribution to the Canadian economy is around 30%, which effectively portrays the huge SME culture in the country. Since, SMEs and startups are the major customers of HVAC contained servers, they are expected to fuel the market growth in Canada.

The break-up profiles of primary participants are given below as:

By company: Tier 1 – 21%, Tier 2 – 32%, and Tier 3 – 47%

By designation: C-level – 38%, Director level – 33%, and Others – 29%

By country: US – 67%, and Canada - 33%

Various key HVAC contained server providers in the report are:

1. Black Box Corporation (Pennsylvania, US)
2. Vertiv Co. (Ohio, US)

3. Schneider Electric (Rueil-Malmaison, France)
4. STULZ GmbH (Hamburg, Germany)
5. Hitachi Systems (Tokyo, Japan)
6. Tripp Lite (Illinois, US)
7. Rackmount Solutions (Texas, US)
8. EIC Solutions, Inc. (Pennsylvania, US)
9. Crenlo (Minnesota, US)
10. Karis Technologies Inc. (Toronto, Canada)

Research Coverage

The North America HVAC contained server market has been segmented based on form factors, cooling capacities, organization sizes, verticals, and countries. A detailed analysis of the key industry players has been done to provide key insights into their business overviews; products and services; key strategies; new product launches; partnerships, agreements, and collaborations; business expansions; and competitive landscape associated with the North America HVAC contained server market.

The report will help the market leaders/new entrants in this market in the following ways:

This report segments the North America HVAC contained server market comprehensively and provides the closest approximations of the revenue numbers for the overall market and the subsegments across different verticals and countries.

This report helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

This report will help stakeholders to better understand the competitors and gain more insights to enhance their position in the business. The competitive landscape section includes competitor ecosystem, new product developments, partnerships, and mergers and acquisitions.

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Contents

1 INTRODUCTION

1.1 OBJECTIVES OF THE STUDY
1.2 MARKET DEFINITION
1.3 MARKET SCOPE
1.4 YEARS CONSIDERED FOR THE STUDY
1.5 CURRENCY
1.6 STAKEHOLDERS

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA
2.1.1 SECONDARY DATA
2.1.2 PRIMARY DATA
2.1.2.1 Key industry insights
2.1.2.2 Breakdown of primaries
2.2 MARKET SIZE ESTIMATION
2.3 RESEARCH ASSUMPTIONS
2.4 LIMITATIONS

3 EXECUTIVE SUMMARY

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE MARKET OPPORTUNITIES IN THE NORTH AMERICA HVAC CONTAINED SERVER MARKET
4.2 NORTH AMERICA HVAC CONTAINED SERVER MARKET: MARKET SHARE OF FORM FACTOR AND COOLING CAPACITY, 2017
4.3 NORTH AMERICA HVAC CONTAINED SERVER MARKET: TOP 3 VERTICALS, 2017–2022

5 MARKET OVERVIEW

5.1 INTRODUCTION
5.2 MARKET DYNAMICS
5.2.1 DRIVERS
5.2.1.1 Exponential increase in server rack densities

5.2.1.2 Significant cost savings achieved by server owners
5.2.1.3 Proliferation of SMEs and startups worldwide
5.2.1.4 Rapid deployment and less construction period
5.2.1.5 Need to eliminate overcooling
5.2.2 RESTRAINTS
5.2.2.1 Decline in demand for server hardware due to consolidation and virtualization
5.2.3 OPPORTUNITIES
5.2.3.1 Rapid growth in data and server traffic
5.2.3.2 Global focus on carbon footprint of servers
5.2.3.3 Huge demand for IoT and edge computing
5.2.4 CHALLENGES
5.2.4.1 Less awareness about HVAC contained servers in the market
5.2.4.2 Manufacturing HVAC contained server cabinets according to rack size and volume
5.3 ASSOCIATIONS AND STANDARDS
5.3.1 INTRODUCTION
5.3.2 NATIONAL ELECTRICAL MANUFACTURERS ASSOCIATION (NEMA)
5.3.3 AMERICAN NATIONAL STANDARDS INSTITUTE (ANSI)
5.3.4 AMERICAN SOCIETY OF HEATING, REFRIGERATING, AND AIR CONDITIONING ENGINEERS (ASHRAE)
5.3.5 CANADIAN STANDARDS ASSOCIATION GROUP (CSA)
5.3.6 UNITED STATES ENVIRONMENTAL PROTECTION AGENCY (US EPA)
5.4 ECOSYSTEM

6 NORTH AMERICA HVAC CONTAINED SERVER MARKET ANALYSIS, BY FORM FACTOR

6.1 INTRODUCTION
6.2 BELOW 20 U
6.3 20 TO 40 U
6.4 ABOVE 40 U

7 NORTH AMERICA HVAC CONTAINED SERVER MARKET ANALYSIS, BY COOLING CAPACITY

7.1 INTRODUCTION
7.2 BELOW 6,000 BTU
7.3 6,000 TO 10,000 BTU
7.4 ABOVE 10,000 BTU

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8 NORTH AMERICA HVAC CONTAINED SERVER MARKET ANALYSIS, BY ORGANIZATION SIZE

8.1 INTRODUCTION
8.2 SMALL AND MEDIUM-SIZED ENTERPRISES
8.3 LARGE ENTERPRISES

9 NORTH AMERICA HVAC CONTAINED SERVER MARKET ANALYSIS, BY VERTICAL

9.1 INTRODUCTION
9.2 BANKING, FINANCIAL SERVICES, AND INSURANCE
9.3 IT AND TELECOM
9.4 MANUFACTURING
9.5 RETAIL
9.6 EDUCATION
9.7 HEALTHCARE
9.8 GOVERNMENT AND DEFENSE
9.9 OTHERS

10 GEOGRAPHIC ANALYSIS

10.1 INTRODUCTION
10.1.1 UNITED STATES
10.1.2 CANADA

11 COMPETITIVE LANDSCAPE

11.1 INTRODUCTION
11.1.1 VISIONARY LEADERS
11.1.2 INNOVATORS
11.1.3 DYNAMIC DIFFERENTIATORS
11.1.4 EMERGING COMPANIES
11.2 COMPETITIVE BENCHMARKING

12 COMPANY PROFILES

(Overview, Financials, Products & Services, Strategy, and Developments)*

12.1 BLACK BOX CORPORATION
12.2 VERTIV CO.
12.3 SCHNEIDER ELECTRIC SE
12.4 STULZ GMBH
12.5 HITACHI SYSTEMS
12.6 TRIPP LITE
12.7 RACKMOUNT SOLUTIONS
12.8 EIC SOLUTIONS, INC.
12.9 CRENLO
12.10 KARIS TECHNOLOGIES INC.

*Details on overview, financials, product & services, strategy, and developments might not be captured in case of unlisted companies.

13 APPENDIX

13.1 KEY INDUSTRY INSIGHTS
13.2 DISCUSSION GUIDE
13.3 KNOWLEDGE STORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL
13.4 INTRODUCING RT: REAL-TIME MARKET INTELLIGENCE
13.5 RELATED REPORTS
13.6 AUTHOR DETAILS

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List Of Tables

LIST OF TABLES

Table 1 UNITED STATES DOLLAR EXCHANGE RATE, 2014–2016
Table 2 NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE AND GROWTH RATE, 2015–2022 (USD MILLION, Y-O-Y %)
Table 3 NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY FORM FACTOR, 2015–2022 (USD MILLION)
Table 4 BELOW 20 U: NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY COUNTRY, 2015–2022 (USD MILLION)
Table 5 20 TO 40 U: NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY COUNTRY, 2015–2022 (USD MILLION)
Table 6 ABOVE 40 U: NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY COUNTRY, 2015–2022 (USD MILLION)
Table 7 NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY COOLING CAPACITY, 2015–2022 (USD MILLION)
Table 8 BELOW 6,000 BTU: NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY COUNTRY, 2015–2022 (USD MILLION)
Table 9 6,000 TO 10,000 BTU: NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY COUNTRY, 2015–2022 (USD MILLION)
Table 10 ABOVE 10,000 BTU: NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY COUNTRY, 2015–2022 (USD MILLION)
Table 11 NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY ORGANIZATION SIZE, 2015–2022 (USD MILLION)
Table 12 SMALL AND MEDIUM-SIZED ENTERPRISES: NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY COUNTRY, 2015–2022 (USD MILLION)
Table 13 LARGE ENTERPRISES: NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY COUNTRY, 2015–2022 (USD MILLION)
Table 14 NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY VERTICAL, 2015–2022 (USD MILLION)
Table 15 BANKING, FINANCIAL SERVICES, AND INSURANCE: NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY COUNTRY, 2015–2022 (USD MILLION)
Table 16 IT AND TELECOM: NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY COUNTRY, 2015–2022 (USD MILLION)
Table 17 MANUFACTURING: NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY COUNTRY, 2015–2022 (USD MILLION)
Table 18 RETAIL: NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE,

BY COUNTRY, 2015–2022 (USD MILLION)
Table 19 EDUCATION: NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY COUNTRY, 2015–2022 (USD MILLION)
Table 20 HEALTHCARE: NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY COUNTRY, 2015–2022 (USD MILLION)
Table 21 GOVERNMENT AND DEFENSE: NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY COUNTRY, 2015–2022 (USD MILLION)
Table 22 OTHERS: NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY COUNTRY, 2015–2022 (USD MILLION)
Table 23 NORTH AMERICA HVAC CONTAINED SERVER MARKET SIZE, BY COUNTRY, 2015–2022 (USD MILLION)
Table 24 UNITED STATES HVAC CONTAINED SERVER MARKET SIZE AND GROWTH RATE, 2015–2022 (USD MILLION, Y-O-Y %)
Table 25 UNITED STATES HVAC CONTAINED SERVER MARKET SIZE, BY FORM FACTOR, 2015–2022 (USD MILLION)
Table 26 UNITED STATES HVAC CONTAINED SERVER MARKET SIZE, BY COOLING CAPACITY, 2015–2022 (USD MILLION)
Table 27 UNITED STATES HVAC CONTAINED SERVER MARKET SIZE, BY VERTICAL, 2015–2022 (USD MILLION)
Table 28 CANADA HVAC CONTAINED SERVER MARKET SIZE AND GROWTH RATE, 2015–2022 (USD MILLION, Y-O-Y %)
Table 29 CANADA HVAC CONTAINED SERVER MARKET SIZE, BY FORM FACTOR, 2015–2022 (USD MILLION)
Table 30 CANADA HVAC CONTAINED SERVER MARKET SIZE, BY COOLING CAPACITY, 2015–2022 (USD MILLION)
Table 31 CANADA HVAC CONTAINED SERVER MARKET SIZE, BY VERTICAL, 2015–2022 (USD MILLION)
Table 32 NORTH AMERICA HVAC CONTAINED SERVER MARKET VENDOR RANKING, 2017

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List Of Figures

LIST OF FIGURES

Figure 1 NORTH AMERICA HVAC CONTAINED SERVER MARKET: MARKET SEGMENTATION
Figure 2 NORTH AMERICA HVAC CONTAINED SERVER MARKET: RESEARCH DESIGN
Figure 3 BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY, DESIGNATION, AND COUNTRY
Figure 4 DATA TRIANGULATION
Figure 5 MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH
Figure 6 MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH
Figure 7 NORTH AMERICA HVAC CONTAINED SERVER MARKET: ASSUMPTIONS
Figure 8 EXPONENTIAL INCREASE IN SERVER RACK DENSITIES IS CONTRIBUTING TO THE GROWTH OF THE NORTH AMERICA HVAC CONTAINED SERVER MARKET DURING THE FORECAST PERIOD
Figure 9 20 TO 40 U FORM FACTOR AND BELOW 6,000 BTU COOLING CAPACITY ARE ESTIMATED TO HAVE THE LARGEST MARKET SHARES IN 2017
Figure 10 BANKING, FINANCIAL SERVICES, AND INSURANCE VERTICAL IS EXPECTED TO GROW AT THE HIGHEST CAGR
Figure 11 NORTH AMERICA HVAC CONTAINED SERVER MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES
Figure 12 NORTH AMERICA HVAC CONTAINED SERVER MARKET ECOSYSTEM
Figure 13 THE 20 TO 40 U FORM FACTOR IS ESTIMATED TO HAVE THE LARGEST MARKET SIZE IN 2017
Figure 14 THE BELOW 6,000 BTU SEGMENT IS EXPECTED TO HAVE THE LARGEST MARKET SIZE DURING THE FORECAST PERIOD
Figure 15 SMALL AND MEDIUM-SIZED ENTERPRISES SEGMENT IS EXPECTED TO HAVE A LARGER MARKET SIZE DURING THE FORECAST PERIOD
Figure 16 IT AND TELECOM VERTICAL IS ESTIMATED TO HOLD THE LARGEST MARKET SIZE IN 2017
Figure 17 NORTH AMERICA: MARKET SNAPSHOT
Figure 18 THE UNITED STATES IS ESTIMATED TO HOLD A LARGER MARKET SIZE IN 2017
Figure 19 NORTH AMERICA HVAC CONTAINED SERVER MARKET COMPETITIVE LEADERSHIP MAPPING, 2017
Figure 20 PRODUCT OFFERINGS
Figure 21 BUSINESS STRATEGIES

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Figure 22 BLACK BOX CORPORATION: COMPANY SNAPSHOT
Figure 23 SCHNEIDER ELECTRIC SE: COMPANY SNAPSHOT
Figure 24 HITACHI SYSTEMS: COMPANY SNAPSHOT

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