

OCP Rack Market By Application (AI, High-performance computing, Data Management, Enterprise Apps & Others), End User (Retail Colocation, Enterprise, Neocloud Providers, Others – Hyperscalers/Wholesale Colocation) - Global Forecast to 2030

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Abstracts

The OCP rack market is expanding rapidly, with the market projected to grow from USD 1.68 billion in 2025 to USD 4.32 billion by 2030, at a CAGR of 21.0%. The expansion of edge computing is emerging as a distinct driver for the OCP rack market, as data processing increasingly shifts closer to end users and devices. Edge facilities are typically space-constrained and require compact, efficient, and easily deployable infrastructure. OCP rack designs, developed under the Open Compute Project, support these requirements through simplified mechanical structures, modular configurations, and efficient power distribution. Unlike large hyperscale environments, edge deployments often prioritize rapid installation and operational consistency across multiple distributed sites. OCP-based racks enable standardized designs that can be replicated with minimal customization, reducing deployment time and integration complexity. In addition, the ability to support higher compute density within a smaller footprint aligns with edge requirements where real estate and power availability are limited. As edge use cases expand across telecom, content delivery, and industrial applications, demand for flexible and scalable rack solutions is expected to support increased adoption of OCP architectures.

“By application, the high-performance computing (HPC) is projected to be the second-fastest-growing in the market during the forecast period.”

High-performance computing (HPC) is projected to be the second fastest-growing application in the OCP rack market, supported by increasing demand for compute-intensive workloads across research, enterprise, and industrial use cases. HPC environments require tightly integrated systems with high power density, low-latency networking, and efficient thermal management. OCP rack architectures address these requirements by supporting higher rack power capacities and enabling advanced cooling solutions, including liquid cooling. This allows operators to deploy dense compute clusters without exceeding facility constraints. In addition, HPC workloads often require repeatable and scalable infrastructure designs, which aligns with the standardized approach of OCP racks. As organizations expand simulation, modeling, and AI-assisted computing capabilities, the need for efficient and scalable HPC infrastructure is increasing, contributing to the accelerated adoption of OCP-based rack systems.

“By end user, the others segment is expected to hold the largest market value during the forecast period.”

The **“others”** segment, comprising hyperscalers and wholesale colocation providers, is expected to hold the largest market value in the OCP rack market due to the scale and standardization of their infrastructure deployments. These operators build and operate large data center campuses designed for uniform, repeatable architectures, where OCP racks aligned with Open Compute Project standards provide clear advantages in terms of efficiency and scalability. Hyperscalers deploy OCP-based systems to support high-density workloads, particularly for AI and cloud services, while wholesale colocation providers adopt similar designs to meet the requirements of large tenants. Their ability to invest in custom facility design, including high-capacity power and liquid cooling infrastructure, further supports OCP adoption. Additionally, these players typically operate with long planning horizons and large capital budgets, enabling early adoption of new rack architectures. This combination of scale, standardization, and infrastructure readiness positions the segment as the largest contributor to OCP rack demand.

“North America leads the OCP rack market during the forecast.”

North America is expected to hold the largest market value in the OCP rack market due to its concentration of hyperscale capacity, early adoption of open hardware standards, and continued investment in AI infrastructure. The region hosts major contributors to the Open Compute Project ecosystem, including large cloud providers that design and deploy OCP-based architectures at scale. These operators have already transitioned significant portions of their infrastructure to 21-inch Open Rack designs, enabling higher

power density, efficient thermal management, and standardized deployments across multiple campuses.

The rapid expansion of AI training and inference clusters is driving the market as it requires rack-level optimization for power delivery and cooling, particularly with the increasing adoption of liquid cooling and high-capacity busbar systems. In parallel, wholesale colocation providers in North America are aligning new facility builds with OCP requirements to support hyperscale tenants, further reinforcing demand. The region is also seeing continued advancement in rack-scale integration, where compute, networking, and cooling are deployed as pre-integrated systems rather than discrete components. This reduces deployment timelines and operational complexity. Combined with strong supply chain presence across OEMs, ODMs, and infrastructure vendors, these factors position North America as the leading market for OCP rack deployments.

Breakdown of Primaries

In-depth interviews were conducted with Chief Executive Officers (CEOs), innovation and technology directors, system integrators, and executives from various key organizations operating in the OCP rack market.

By Company: Tier 1 - 35%, Tier 2 - 45%, and Tier 3 - 20%

By Designation: Directors - 35%, Managers - 25%, and Others - 40%

By Region: North America - 25%, Europe - 45%, Asia Pacific - 25%, Middle East & Africa - 3%, and Latin America - 2%.

The report includes a detailed study of key players operating in the OCP rack market. The major market participants covered in the study include Rittal (Germany), Dell Technologies (US), Sanmina Corporation (US), Legrand (France), Vertiv (US), Eaton (Ireland), Belden (US), Wiwynn Corporation (Taiwan), Lite-on Cloud Infrastructure (Taiwan), Cheval Group, Gigabyte (Taiwan), and Chatsworth Product (US).

Research Coverage

This research report categorizes the OCP rack market based on applications By Applications (AI (training & inference), high performance computing (HPC), data management and enterprise apps & others), By end users (retail colocation providers,

enterprise, necloud providers and others (hyperscalers/ wholesale colocation providers) and Region (North America, Europe, Asia Pacific, Middle East & Africa, and Latin America).

The report's scope encompasses detailed insights into the key factors influencing the OCP rack market, including drivers, restraints, challenges, and opportunities shaping its growth. It provides a comprehensive analysis of leading vendors, covering their product portfolios, rack-scale capabilities, and alignment with standards defined by the Open Compute Project. The report also examines strategic initiatives such as partnerships with hyperscalers and ODMs, collaborations across the OCP ecosystem, product innovations in rack design, power and cooling integration, as well as mergers, acquisitions, and recent developments impacting the OCP rack market landscape.

Reason to Buy this Report

The report provides market leaders and new entrants with insights into the closest estimations of revenue for the overall OCP rack market and its subsegments. It enables stakeholders to understand the competitive landscape and gain actionable insights to better position their offerings and develop effective go-to-market strategies. Additionally, the report helps stakeholders assess market trends and dynamics by providing a detailed analysis of key drivers, restraints, challenges, and opportunities shaping the OCP rack market.

The report provides insights into the following points:

The report provides insights into key drivers, restraints, opportunities, and challenges shaping the OCP rack market. Major drivers include AI rack power density exceeding driving OCP adoption, rack-scale integrated infrastructure replacing component-level deployments, and hyperscaler-led standardization accelerating global OCP adoption. Restraints include limited compatibility with legacy 19-inch rack infrastructure and high upfront redesign costs for facility power and cooling systems. Opportunities include integration of liquid cooling (D2C and immersion) within rack designs, pre-configured AI-ready rack solutions for hyperscale and neo-cloud players. Key challenges include interoperability issues in multi-vendor OCP ecosystems and legacy system complexity impacting deployment efficiency.

Services Development/Innovation: Detailed insight into upcoming technologies, research & development activities, and new product & service launches in the

OCP rack market

Market Development: Comprehensive information about lucrative markets – the report analyses the OCP rack market across varied regions

Market Diversification: Exhaustive information about new services, untapped geographies, recent developments, and investments in the OCP rack market

Competitive Assessment: In-depth assessment of market shares, growth strategies and OCP rack offerings of leading players such as Rittal (Germany), Dell Technologies (US), Sanmina Corporation (US), Legrand (France), Vertiv (US), Eaton (Ireland), Belden (US), Wiwynn Corporation (Taiwan), Lite-on Cloud Infrastructure (Taiwan), Cheval Group, Gigabyte (Taiwan), and Chatsworth Product (US). The report also helps stakeholders understand the OCP rack market by providing information on key drivers, restraints, challenges, and opportunities.

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