

Data Center Rack Power Distribution Unit Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Metering & Monitoring (Basic Metering, Advanced Metering, Intelligent Metering), By Deployment Mode (In-Row, Rear Door, Busway), By Power Capacity (0-5kW, 5-10kW, 10-15kW, 15kW and Above), By Region, By Competition 2020-2030F

<https://marketpublishers.com/r/D70B582CBCC5EN.html>

Date: January 2025

Pages: 185

Price: US\$ 4,500.00 (Single User License)

ID: D70B582CBCC5EN

Abstracts

The Global Data Center Rack Power Distribution Unit Market was valued at USD 1.97 billion in 2024 and is expected to reach USD 3.48 billion by 2030 with a CAGR of 9.95% through 2030. A Data Center Rack Power Distribution Unit is an essential component used in data centers to distribute electrical power to various devices, servers, and networking equipment housed in racks. These units ensure the efficient and reliable distribution of power while maintaining the integrity of critical infrastructure within the data center. Data Center Rack Power Distribution Units are typically installed in server racks, offering features such as multiple outlets, surge protection, and real-time monitoring capabilities to enhance performance and prevent power-related issues. They are critical for maintaining operational continuity in environments where downtime can have significant financial and operational consequences. The market for Data Center Rack Power Distribution Units is expected to experience substantial growth in the coming years, driven by several key factors. The rapid expansion of data centers, fueled by the increasing reliance on cloud computing, big data analytics, and the Internet of Things, is creating a higher demand for power distribution solutions. As more data centers are built to support growing digital infrastructures, the need for efficient power distribution becomes more critical. As businesses strive for greater energy efficiency and sustainability, there is an increased adoption of advanced Data Center Rack Power Distribution Units that offer features like energy monitoring, power usage optimization,

and automated load balancing. These capabilities are increasingly important as organizations focus on reducing energy consumption and costs while meeting environmental standards. The proliferation of high-performance computing and data-intensive applications necessitates more sophisticated power distribution systems that can support high-density racks, ensuring that power is consistently delivered to the right components without overloading the system. The market is also benefiting from innovations in smart power distribution units, which enable remote monitoring, control, and predictive maintenance, thus improving operational efficiency and reducing the risk of failure. As data centers continue to evolve in size and complexity, and as companies increasingly prioritize energy efficiency, the demand for advanced Data Center Rack Power Distribution Units is expected to grow significantly. This growth will be further accelerated by the increasing adoption of green and sustainable data center practices, as well as the rising need for high-density computing solutions that require optimized power management systems. In conclusion, the Data Center Rack Power Distribution Unit Market will rise due to the expanding data center industry, the push for greater energy efficiency, and technological advancements aimed at improving power management and sustainability in the sector. The global public cloud services industry is projected to exceed USD 1.6 trillion by 2027, contributing to the demand for more data center capacity to support cloud computing infrastructure.

Key Market Drivers

Expansion of Data Centers Driven by Cloud Computing and Big Data

The rapid expansion of data centers, fueled by the growing demand for cloud computing, big data analytics, and the Internet of Things (IoT), is a major driver for the Data Center Rack Power Distribution Unit Market. As companies increasingly migrate their infrastructure to the cloud to accommodate the rising volumes of data generated globally, there is a pressing need for efficient, scalable power distribution systems. Data centers serve as the backbone of cloud computing services, which rely on massive amounts of data storage, processing, and transmission. As more businesses adopt cloud-based applications and services, the number of data centers is expanding rapidly, creating a significant demand for power distribution solutions that can support higher densities and manage the increasing power loads. The shift to data-driven business models in sectors such as finance, healthcare, manufacturing, and retail has resulted in more intensive computational workloads, further driving the growth of data centers. High-performance computing, artificial intelligence, and machine learning also require specialized data center infrastructures capable of handling high power demands and complex systems. This growth in data center infrastructure leads to a higher need for

reliable and efficient power distribution systems. With the trend towards cloud computing accelerating, the market for Data Center Rack Power Distribution Units is expected to grow significantly, providing efficient energy distribution while minimizing downtime and ensuring high operational performance. Data center investments are expected to reach over USD 50 billion annually by the end of 2025, with a focus on scaling cloud infrastructure, improving energy efficiency, and supporting new technologies like AI, big data, and machine learning.

Increased Demand for Energy Efficiency and Sustainability in Data Centers

The growing emphasis on energy efficiency and sustainability is another major driver for the Data Center Rack Power Distribution Unit Market. Data centers are notoriously energy-intensive, consuming large amounts of electricity to power servers, cooling systems, and other infrastructure. As environmental regulations become stricter and organizations strive to meet sustainability goals, data centers are under increasing pressure to reduce energy consumption and carbon emissions. This shift towards sustainable operations has spurred the demand for power distribution systems that can optimize energy usage and ensure that the power supplied to various equipment is both sufficient and efficient. Advanced Data Center Rack Power Distribution Units now feature energy monitoring, load balancing, and remote monitoring capabilities, which enable data center operators to gain real-time insights into power consumption and identify areas for improvement. These units can help optimize energy usage by providing the necessary power only when and where it is needed, avoiding wastage and improving the overall efficiency of the data center. Many modern power distribution systems offer automated shut-off capabilities, helping to reduce energy consumption during off-peak hours or during low-demand periods. The growing awareness of energy sustainability is pushing organizations to adopt these advanced power distribution solutions, driving market growth for Data Center Rack Power Distribution Units. By the end of 2025, it is expected that the number of data centers worldwide will exceed 8,000, as more companies invest in data infrastructure to meet the needs of digital services, big data analytics, and cloud computing.

Technological Advancements in Smart Power Distribution Systems

Technological advancements in smart power distribution systems are contributing significantly to the growth of the Data Center Rack Power Distribution Unit Market. In today's digital world, data centers must support not only the physical distribution of power but also offer advanced functionality for real-time monitoring, fault detection, and performance optimization. Smart Data Center Rack Power Distribution Units integrate

with cloud-based management platforms, offering enhanced features such as remote control, automated power cycling, and predictive maintenance. These smart power distribution systems also enable data center operators to monitor power usage, detect inefficiencies, and optimize load balancing across various equipment in real time. The ability to remotely monitor and manage power distribution reduces the need for manual intervention and enables faster troubleshooting of power-related issues, leading to increased operational efficiency. Furthermore, advanced smart units can be integrated with other systems in the data center, such as cooling and temperature control, to optimize overall energy consumption. The continued evolution of smart power distribution systems, with increased automation and advanced monitoring capabilities, is driving the growth of the market by offering more efficient, scalable, and reliable solutions for modern data centers. The number of smart meters installed worldwide is projected to exceed 900 million by 2025, playing a crucial role in the data collection and monitoring aspects of smart power distribution systems.

Regulatory Compliance and Increased Focus on Data Security

Regulatory compliance and the growing focus on data security are also driving the market for Data Center Rack Power Distribution Units. As the world becomes more digitized, data security and privacy have become critical concerns for organizations across all sectors. Data centers, as the storage hubs for sensitive information, are subject to stringent regulations that demand a high level of security, redundancy, and fault tolerance. Power distribution is a critical component in ensuring the reliability and security of data center operations. Regulations such as the General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA) have heightened the need for robust infrastructure capable of supporting security measures in data centers. Data centers must ensure that power supply systems are secure, reliable, and capable of handling unexpected failures or disruptions. Data Center Rack Power Distribution Units with built-in redundancy, surge protection, and backup power capabilities help mitigate the risk of power failures that could lead to data breaches or downtime. The regulatory pressures around data security and the increasing importance of uptime for critical operations are driving investments in high-quality, secure, and reliable power distribution systems, thus accelerating market growth.

Key Market Challenges

Complexity in Managing Power Distribution for High-Density Environments

As data centers increasingly adopt high-density computing environments, the challenge

of managing power distribution effectively has become a significant hurdle for the Data Center Rack Power Distribution Unit Market. High-density server racks, which house more servers and equipment in the same physical space, generate higher heat and demand more power than traditional configurations. This shift presents multiple complexities for power distribution systems, including the need for more precise load balancing, higher capacity handling, and robust backup solutions. Data center operators must ensure that the power distribution infrastructure can effectively manage this increased power load without causing overloading, overheating, or energy inefficiencies. High-density setups require power distribution units that can support advanced features, such as real-time monitoring, automated load adjustments, and fault-tolerant systems, which increase the technical complexity of the power distribution solution. The design of power distribution systems must not only cater to high power demands but also ensure that the system remains operational without causing disruptions in services. These high-density systems often require more complex configurations and specialized components that can add to the upfront cost and maintenance challenges of power distribution units. As businesses push for more powerful and compact data center configurations, the need for innovative solutions that can maintain the integrity of power delivery in high-density environments remains one of the major challenges for the Data Center Rack Power Distribution Unit Market.

Rising Energy Costs and Sustainability Demands

Energy consumption is a major concern in data centers, given their immense power requirements. With global energy prices rising and stricter environmental regulations being enforced, there is increasing pressure on data centers to reduce their energy consumption. This trend has created a significant challenge for the Data Center Rack Power Distribution Unit Market. Power distribution systems are essential in managing energy usage efficiently across the entire data center infrastructure, and as energy costs continue to climb, organizations are looking for ways to optimize their energy consumption to reduce operational costs. In response to these pressures, data centers are expected to adopt more energy-efficient solutions, and power distribution units are expected to play a key role in this. However, designing power distribution systems that both meet the energy demands of high-density racks and ensure energy efficiency is a complex task. The technology must evolve to balance power supply with the increasing operational needs of modern applications such as artificial intelligence and machine learning, which demand significant computing power. Companies are increasingly facing sustainability requirements from governments, regulatory bodies, and consumers. As a result, data centers must adopt environmentally responsible solutions, which includes reducing power consumption and minimizing carbon footprints. This

requires power distribution units that are not only energy-efficient but also capable of monitoring energy use, identifying inefficiencies, and adjusting loads dynamically to ensure optimal performance. While manufacturers of power distribution units are working to meet these sustainability requirements by offering more energy-efficient products, the overall challenge of balancing power demand with environmental goals remains a significant one for the Data Center Rack Power Distribution Unit Market.

Technological Integration and Compatibility with Legacy Systems

As data centers evolve and upgrade their infrastructure, integrating new power distribution technologies with existing legacy systems can present a formidable challenge. Data center operators often face difficulty when trying to implement modern power distribution solutions into their older systems, as there are significant compatibility issues to address. Many older data centers still rely on traditional, less efficient power distribution methods, and transitioning to newer, more advanced solutions requires careful planning and execution to avoid disruptions in service. One of the major challenges of this integration is ensuring that modern power distribution units can work seamlessly with existing data center equipment, which may not have been designed to support the more sophisticated power management features that come with newer distribution systems. This can result in operational inefficiencies, increased costs, and longer transition periods. The integration of power distribution units with other critical systems such as cooling systems, network management, and fire suppression mechanisms must be managed carefully to avoid compatibility issues that could lead to system failures or downtime. Another challenge lies in the need for staff to be trained on both the new and old systems, which can be time-consuming and costly. Data centers often operate 24/7, and any downtime during the installation or integration of new systems could lead to operational disruptions and service outages. As the market for power distribution units evolves with advancements in technology, data centers must continually evaluate and update their infrastructure, often at great expense, to stay competitive and meet emerging demands. This challenge of integration, along with the potential risks of operational inefficiencies and disruptions, remains a key obstacle for the Data Center Rack Power Distribution Unit Market, as organizations seek to modernize their power distribution systems while maintaining business continuity.

Key Market Trends

Increasing Adoption of Intelligent Power Distribution Units

One of the most prominent trends driving the Data Center Rack Power Distribution Unit

Market is the increasing adoption of intelligent power distribution units. These units are equipped with advanced features such as remote monitoring, energy consumption analytics, real-time diagnostics, and predictive maintenance capabilities. As data centers grow in size and complexity, with higher server densities and demands for continuous uptime, intelligent power distribution units offer significant advantages. They allow operators to monitor the health of their power systems in real-time, identifying potential issues before they cause significant downtime. This predictive capability is vital for maintaining high availability and optimizing the power management of critical infrastructure. Intelligent power distribution units enable more efficient load balancing by dynamically adjusting power usage based on real-time data, ensuring that data centers are operating at peak efficiency. They also provide actionable insights that can drive long-term improvements in power consumption, reducing operational costs. The integration of artificial intelligence and machine learning technologies into power distribution systems enhances these units' ability to predict failures and recommend corrective actions, improving reliability and minimizing disruptions. The ability to track energy usage helps data centers achieve sustainability goals by reducing energy waste and lowering their carbon footprint. As data centers continue to evolve, the demand for intelligent power distribution units is expected to grow significantly, making them a key component of modern data center infrastructures. This trend will continue as companies increasingly prioritize energy efficiency, operational continuity, and predictive maintenance capabilities in their data center strategies.

Focus on Energy Efficiency and Sustainability

Energy efficiency and sustainability have become central pillars in the design and operation of data centers, significantly influencing the Data Center Rack Power Distribution Unit Market. The global push toward reducing carbon footprints, along with rising energy costs, has led data center operators to prioritize energy-efficient technologies. Data centers are responsible for a substantial portion of global electricity consumption, and as they scale, the demand for energy-efficient solutions becomes increasingly critical. Power distribution units that optimize energy consumption, minimize losses, and reduce waste are now at the forefront of this market. Manufacturers of power distribution units are integrating advanced technologies that improve energy efficiency, such as dynamic load management, automatic voltage optimization, and power factor correction, to ensure that data centers operate in the most energy-efficient manner possible. These systems provide real-time visibility into energy usage, helping operators identify inefficiencies and implement corrective actions to reduce energy consumption. With growing regulatory pressures, sustainability has become a driving factor in the adoption of energy-efficient power distribution solutions.

Many data centers are now aiming to meet sustainability targets by using renewable energy sources and reducing their overall energy consumption. Furthermore, the trend toward sustainable data centers has led to the development of new products that are not only energy-efficient but also environmentally friendly in terms of material usage and lifecycle management. As environmental regulations become stricter, data center operators are increasingly turning to power distribution units that help them reduce their energy consumption and minimize their environmental impact. This trend is expected to continue as data centers become more integrated with the global effort to combat climate change.

Integration with Cloud and Edge Computing Infrastructures

The growing trend of integrating Data Center Rack Power Distribution Units with cloud and edge computing infrastructures is rapidly reshaping the market. As enterprises adopt more hybrid and multi-cloud strategies, data centers must become more agile and adaptable to support the diverse and distributed nature of cloud and edge computing environments. These distributed environments require power solutions that can efficiently manage resources across various locations, from on-premises data centers to edge sites and cloud-based platforms. Power distribution units are increasingly being designed to integrate seamlessly with cloud-based management platforms, enabling centralized monitoring and control of power usage across geographically dispersed infrastructures. This integration allows data center operators to gain a unified view of their power distribution systems, even if they span multiple locations. Cloud-based integration provides scalability and flexibility, allowing data centers to quickly adapt to changing power demands based on workload fluctuations. Edge computing, which involves placing computing resources closer to end users for faster processing, also requires power distribution units that can handle decentralized, low-latency environments. These power solutions must support the unique needs of edge locations, such as remote monitoring, robust performance in variable conditions, and scalability to accommodate fluctuating workloads. The rise of the Internet of Things, 5G networks, and AI-driven applications further contributes to the need for efficient power management solutions that can support edge data centers. As cloud and edge computing become more prevalent, the demand for power distribution units capable of supporting these infrastructures is set to increase, driving innovation in the market and fueling the next phase of growth for the Data Center Rack Power Distribution Unit industry.

Segmental Insights

Metering & Monitoring Insights

Intelligent metering segment dominated the Data Center Rack Power Distribution Unit Market in 2024 and is projected to maintain its leadership throughout the forecast period. Intelligent metering systems offer advanced features such as real-time monitoring, predictive analytics, and automated reporting, which provide data center operators with a deeper understanding of power consumption patterns. These systems can optimize energy usage, enhance operational efficiency, and ensure compliance with energy-saving regulations. The integration of intelligent metering into power distribution units allows for detailed tracking of energy consumption at granular levels, providing insights into areas where energy can be reduced without compromising performance. This level of monitoring is particularly crucial for large-scale data centers that need to maintain uptime and optimize energy efficiency while managing growing data workloads. Intelligent metering offers the ability to integrate with cloud platforms and artificial intelligence tools, enabling predictive maintenance and fault detection before issues impact operations. As data centers become more focused on sustainability and cost-efficiency, the demand for intelligent metering solutions will continue to rise, driven by the need to monitor and manage power consumption at every stage of the infrastructure lifecycle. Intelligent metering enhances the ability to support renewable energy integration, which is increasingly becoming a priority for data center operators. This capability aligns with the broader trend towards sustainable data center operations and aligns with the industry's focus on minimizing energy waste. With these significant benefits, intelligent metering systems are poised to maintain their dominant position in the market throughout the forecast period.

Regional Insights

North America dominated the Data Center Rack Power Distribution Unit Market in 2024 and is anticipated to maintain its leadership throughout the forecast period. This dominance is primarily driven by the region's well-established data center infrastructure, which continues to expand in response to growing demand for cloud computing, big data analytics, and artificial intelligence applications. North America is home to some of the largest global technology companies, including cloud service providers, financial institutions, and telecom giants, all of which heavily rely on advanced data centers. These organizations are increasingly focused on improving energy efficiency, optimizing power distribution, and ensuring the continuous operation of their facilities, making power distribution units a critical component of their infrastructure. North America is a hub for innovation and technological advancements in the data center industry, with significant investments in upgrading data center facilities to support emerging

technologies such as 5G, Internet of Things, and edge computing. This has led to a surge in demand for sophisticated power distribution solutions, including intelligent and modular systems. Moreover, stringent regulatory frameworks surrounding energy consumption and sustainability in the region encourage data center operators to adopt more energy-efficient and sustainable power distribution solutions. The United States, in particular, stands as a global leader in data center operations, with large metropolitan areas and tech-centric regions such as Silicon Valley, Northern Virginia, and Dallas being key centers for data center development. With a focus on reducing carbon footprints and optimizing power management, the Data Center Rack Power Distribution Unit Market in North America is expected to continue its strong growth trajectory, maintaining its dominance in the coming years.

Key Market Players

Schneider Electric SE

Eaton Corporation plc

ABB Ltd.

Siemens AG

Huawei Technologies Co., Ltd.

Koenig & Bauer AG

KEBA Group AG

Emerson Electric Co.

Report Scope:

In this report, the Global Data Center Rack Power Distribution Unit Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Data Center Rack Power Distribution Unit Market, By Metering & Monitoring:

Basic Metering

Advanced Metering

Intelligent Metering

Data Center Rack Power Distribution Unit Market, By Deployment Mode:

In-Row

Rear Door

Busway

Data Center Rack Power Distribution Unit Market, By Power Capacity:

0-5kW

5-10kW

10-15kW

15kW and Above

Data Center Rack Power Distribution Unit Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

France

United Kingdom

Italy

Spain

Belgium

Asia Pacific

China

India

Japan

South Korea

Australia

Indonesia

Vietnam

South America

Brazil

Colombia

Argentina

Chile

Middle East & Africa

Saudi Arabia

UAE

South Africa

Turkey

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Data Center Rack Power Distribution Unit Market.

Available Customizations:

Global Data Center Rack Power Distribution Unit Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Formulation of the Scope
- 2.4. Assumptions and Limitations
- 2.5. Sources of Research
 - 2.5.1. Secondary Research
 - 2.5.2. Primary Research
- 2.6. Approach for the Market Study
 - 2.6.1. The Bottom-Up Approach
 - 2.6.2. The Top-Down Approach
- 2.7. Methodology Followed for Calculation of Market Size & Market Shares
- 2.8. Forecasting Methodology
 - 2.8.1. Data Triangulation & Validation

3. EXECUTIVE SUMMARY

4. VOICE OF CUSTOMER

5. GLOBAL DATA CENTER RACK POWER DISTRIBUTION UNIT MARKET OVERVIEW

6. GLOBAL DATA CENTER RACK POWER DISTRIBUTION UNIT MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast

6.2.1. By Metering & Monitoring (Basic Metering, Advanced Metering, Intelligent Metering)

6.2.2. By Deployment Mode (In-Row, Rear Door, Busway)

6.2.3. By Power Capacity (0-5kW, 5-10kW, 10-15kW, 15kW and Above)

6.2.4. By Region (North America, Europe, South America, Middle East & Africa, Asia Pacific)

6.3. By Company (2024)

6.4. Market Map

7. NORTH AMERICA DATA CENTER RACK POWER DISTRIBUTION UNIT MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Metering & Monitoring

7.2.2. By Deployment Mode

7.2.3. By Power Capacity

7.2.4. By Country

7.3. North America: Country Analysis

7.3.1. United States Data Center Rack Power Distribution Unit Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Metering & Monitoring

7.3.1.2.2. By Deployment Mode

7.3.1.2.3. By Power Capacity

7.3.2. Canada Data Center Rack Power Distribution Unit Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Metering & Monitoring

7.3.2.2.2. By Deployment Mode

7.3.2.2.3. By Power Capacity

7.3.3. Mexico Data Center Rack Power Distribution Unit Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Metering & Monitoring

7.3.3.2.2. By Deployment Mode

7.3.3.2.3. By Power Capacity

8. EUROPE DATA CENTER RACK POWER DISTRIBUTION UNIT MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Metering & Monitoring

8.2.2. By Deployment Mode

8.2.3. By Power Capacity

8.2.4. By Country

8.3. Europe: Country Analysis

8.3.1. Germany Data Center Rack Power Distribution Unit Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Metering & Monitoring

8.3.1.2.2. By Deployment Mode

8.3.1.2.3. By Power Capacity

8.3.2. France Data Center Rack Power Distribution Unit Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Metering & Monitoring

8.3.2.2.2. By Deployment Mode

8.3.2.2.3. By Power Capacity

8.3.3. United Kingdom Data Center Rack Power Distribution Unit Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Metering & Monitoring

8.3.3.2.2. By Deployment Mode

8.3.3.2.3. By Power Capacity

8.3.4. Italy Data Center Rack Power Distribution Unit Market Outlook

8.3.4.1. Market Size & Forecast

8.3.4.1.1. By Value

8.3.4.2. Market Share & Forecast

- 8.3.4.2.1. By Metering & Monitoring
- 8.3.4.2.2. By Deployment Mode
- 8.3.4.2.3. By Power Capacity
- 8.3.5. Spain Data Center Rack Power Distribution Unit Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Metering & Monitoring
 - 8.3.5.2.2. By Deployment Mode
 - 8.3.5.2.3. By Power Capacity
- 8.3.6. Belgium Data Center Rack Power Distribution Unit Market Outlook
 - 8.3.6.1. Market Size & Forecast
 - 8.3.6.1.1. By Value
 - 8.3.6.2. Market Share & Forecast
 - 8.3.6.2.1. By Metering & Monitoring
 - 8.3.6.2.2. By Deployment Mode
 - 8.3.6.2.3. By Power Capacity

9. ASIA PACIFIC DATA CENTER RACK POWER DISTRIBUTION UNIT MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Metering & Monitoring
 - 9.2.2. By Deployment Mode
 - 9.2.3. By Power Capacity
 - 9.2.4. By Country
- 9.3. Asia Pacific: Country Analysis
 - 9.3.1. China Data Center Rack Power Distribution Unit Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Metering & Monitoring
 - 9.3.1.2.2. By Deployment Mode
 - 9.3.1.2.3. By Power Capacity
 - 9.3.2. India Data Center Rack Power Distribution Unit Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value

- 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Metering & Monitoring
 - 9.3.2.2.2. By Deployment Mode
 - 9.3.2.2.3. By Power Capacity
- 9.3.3. Japan Data Center Rack Power Distribution Unit Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Metering & Monitoring
 - 9.3.3.2.2. By Deployment Mode
 - 9.3.3.2.3. By Power Capacity
- 9.3.4. South Korea Data Center Rack Power Distribution Unit Market Outlook
 - 9.3.4.1. Market Size & Forecast
 - 9.3.4.1.1. By Value
 - 9.3.4.2. Market Share & Forecast
 - 9.3.4.2.1. By Metering & Monitoring
 - 9.3.4.2.2. By Deployment Mode
 - 9.3.4.2.3. By Power Capacity
- 9.3.5. Australia Data Center Rack Power Distribution Unit Market Outlook
 - 9.3.5.1. Market Size & Forecast
 - 9.3.5.1.1. By Value
 - 9.3.5.2. Market Share & Forecast
 - 9.3.5.2.1. By Metering & Monitoring
 - 9.3.5.2.2. By Deployment Mode
 - 9.3.5.2.3. By Power Capacity
- 9.3.6. Indonesia Data Center Rack Power Distribution Unit Market Outlook
 - 9.3.6.1. Market Size & Forecast
 - 9.3.6.1.1. By Value
 - 9.3.6.2. Market Share & Forecast
 - 9.3.6.2.1. By Metering & Monitoring
 - 9.3.6.2.2. By Deployment Mode
 - 9.3.6.2.3. By Power Capacity
- 9.3.7. Vietnam Data Center Rack Power Distribution Unit Market Outlook
 - 9.3.7.1. Market Size & Forecast
 - 9.3.7.1.1. By Value
 - 9.3.7.2. Market Share & Forecast
 - 9.3.7.2.1. By Metering & Monitoring
 - 9.3.7.2.2. By Deployment Mode
 - 9.3.7.2.3. By Power Capacity

10. SOUTH AMERICA DATA CENTER RACK POWER DISTRIBUTION UNIT MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Metering & Monitoring

10.2.2. By Deployment Mode

10.2.3. By Power Capacity

10.2.4. By Country

10.3. South America: Country Analysis

10.3.1. Brazil Data Center Rack Power Distribution Unit Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Metering & Monitoring

10.3.1.2.2. By Deployment Mode

10.3.1.2.3. By Power Capacity

10.3.2. Colombia Data Center Rack Power Distribution Unit Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Metering & Monitoring

10.3.2.2.2. By Deployment Mode

10.3.2.2.3. By Power Capacity

10.3.3. Argentina Data Center Rack Power Distribution Unit Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Metering & Monitoring

10.3.3.2.2. By Deployment Mode

10.3.3.2.3. By Power Capacity

10.3.4. Chile Data Center Rack Power Distribution Unit Market Outlook

10.3.4.1. Market Size & Forecast

10.3.4.1.1. By Value

10.3.4.2. Market Share & Forecast

10.3.4.2.1. By Metering & Monitoring

10.3.4.2.2. By Deployment Mode

10.3.4.2.3. By Power Capacity

11. MIDDLE EAST & AFRICA DATA CENTER RACK POWER DISTRIBUTION UNIT MARKET OUTLOOK

11.1. Market Size & Forecast

11.1.1. By Value

11.2. Market Share & Forecast

11.2.1. By Metering & Monitoring

11.2.2. By Deployment Mode

11.2.3. By Power Capacity

11.2.4. By Country

11.3. Middle East & Africa: Country Analysis

11.3.1. Saudi Arabia Data Center Rack Power Distribution Unit Market Outlook

11.3.1.1. Market Size & Forecast

11.3.1.1.1. By Value

11.3.1.2. Market Share & Forecast

11.3.1.2.1. By Metering & Monitoring

11.3.1.2.2. By Deployment Mode

11.3.1.2.3. By Power Capacity

11.3.2. UAE Data Center Rack Power Distribution Unit Market Outlook

11.3.2.1. Market Size & Forecast

11.3.2.1.1. By Value

11.3.2.2. Market Share & Forecast

11.3.2.2.1. By Metering & Monitoring

11.3.2.2.2. By Deployment Mode

11.3.2.2.3. By Power Capacity

11.3.3. South Africa Data Center Rack Power Distribution Unit Market Outlook

11.3.3.1. Market Size & Forecast

11.3.3.1.1. By Value

11.3.3.2. Market Share & Forecast

11.3.3.2.1. By Metering & Monitoring

11.3.3.2.2. By Deployment Mode

11.3.3.2.3. By Power Capacity

11.3.4. Turkey Data Center Rack Power Distribution Unit Market Outlook

11.3.4.1. Market Size & Forecast

11.3.4.1.1. By Value

11.3.4.2. Market Share & Forecast

11.3.4.2.1. By Metering & Monitoring

- 11.3.4.2.2. By Deployment Mode
- 11.3.4.2.3. By Power Capacity
- 11.3.5. Israel Data Center Rack Power Distribution Unit Market Outlook
 - 11.3.5.1. Market Size & Forecast
 - 11.3.5.1.1. By Value
 - 11.3.5.2. Market Share & Forecast
 - 11.3.5.2.1. By Metering & Monitoring
 - 11.3.5.2.2. By Deployment Mode
 - 11.3.5.2.3. By Power Capacity

12. MARKET DYNAMICS

- 12.1. Drivers
- 12.2. Challenges

13. MARKET TRENDS AND DEVELOPMENTS

14. COMPANY PROFILES

- 14.1. Schneider Electric SE
 - 14.1.1. Business Overview
 - 14.1.2. Key Revenue and Financials
 - 14.1.3. Recent Developments
 - 14.1.4. Key Personnel/Key Contact Person
 - 14.1.5. Key Product/Services Offered
- 14.2. Eaton Corporation plc
 - 14.2.1. Business Overview
 - 14.2.2. Key Revenue and Financials
 - 14.2.3. Recent Developments
 - 14.2.4. Key Personnel/Key Contact Person
 - 14.2.5. Key Product/Services Offered
- 14.3. ABB Ltd.
 - 14.3.1. Business Overview
 - 14.3.2. Key Revenue and Financials
 - 14.3.3. Recent Developments
 - 14.3.4. Key Personnel/Key Contact Person
 - 14.3.5. Key Product/Services Offered
- 14.4. Siemens AG
 - 14.4.1. Business Overview

- 14.4.2. Key Revenue and Financials
- 14.4.3. Recent Developments
- 14.4.4. Key Personnel/Key Contact Person
- 14.4.5. Key Product/Services Offered
- 14.5. Huawei Technologies Co., Ltd.
 - 14.5.1. Business Overview
 - 14.5.2. Key Revenue and Financials
 - 14.5.3. Recent Developments
 - 14.5.4. Key Personnel/Key Contact Person
 - 14.5.5. Key Product/Services Offered
- 14.6. Koenig & Bauer AG
 - 14.6.1. Business Overview
 - 14.6.2. Key Revenue and Financials
 - 14.6.3. Recent Developments
 - 14.6.4. Key Personnel/Key Contact Person
 - 14.6.5. Key Product/Services Offered
- 14.7. KEBA Group AG
 - 14.7.1. Business Overview
 - 14.7.2. Key Revenue and Financials
 - 14.7.3. Recent Developments
 - 14.7.4. Key Personnel/Key Contact Person
 - 14.7.5. Key Product/Services Offered
- 14.8. Emerson Electric Co.
 - 14.8.1. Business Overview
 - 14.8.2. Key Revenue and Financials
 - 14.8.3. Recent Developments
 - 14.8.4. Key Personnel/Key Contact Person
 - 14.8.5. Key Product/Services Offered

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

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