

North America Data Center Equipment Market Size and Forecast (2021-2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Equipment Type [Servers, Storage Devices, Cooling Equipment, Power Distribution Units (PDUs), Racks, Enclosures, Others], Servers (Rack Server, Blade Server, Tower Server), Cooling Equipment (Air Conditioners, Chillers, Air Handling Units, Heat Exchangers, Others), Power Distribution Units (Switched Rack PDU, Metered Rack PDU, Monitored Rack PDU, and Basic Rack PDU), Racks (Enclosed Racks, Open Frame Racks, Wall Mount Racks, and Others), and Tier Type (Tier 3, Tier 4, Tier 1, Tier 2)

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Abstracts

The North America data center equipment market is projected to grow significantly, reaching approximately USD 330,610.88 million by 2031, up from USD 112,148.41 million in 2024. This growth represents a compound annual growth rate (CAGR) of 16.8% from 2025 to 2031, driven by increasing investments in data centers as businesses expand their digital infrastructure.

Executive Summary and Market Analysis

The North America data center equipment market is primarily segmented into three countries: the United States, Canada, and Mexico. The surge in investments in data

centers is a key factor driving the demand for data center equipment, as organizations seek to enhance their digital capabilities. This demand necessitates the acquisition of more powerful servers, advanced cooling systems, and robust networking devices to manage the escalating data traffic and storage needs.

Recent developments in the region have further stimulated the data center industry. For instance, in January 2025, President-elect Donald Trump announced a substantial USD 20 billion foreign investment aimed at constructing new data centers across various states, including Texas, Arizona, and Illinois. Additionally, Amazon revealed plans to invest over USD 5 billion in a data center in central Mexico, while the Canadian government allocated USD 169 million to support Toronto-based AI startup Cohere in expanding its data center AI computing capacity, collaborating with New Jersey's CoreWeave for construction.

Government support and investment are crucial in propelling the data center equipment market forward. Companies in North America are increasingly focused on establishing facilities tailored for artificial intelligence (AI) and cloud hyperscale businesses. This trend is creating specialized data centers that meet the high performance, scalability, and energy efficiency demands of these technologies. The rise of AI workloads is reshaping the data center landscape, leading to an unprecedented need for power-intensive infrastructure. AI organizations are influencing site selection, design, and operational requirements, prioritizing markets that offer scalable power capacity and innovative connectivity solutions.

For example, in March 2025, Related Companies, L.P., a prominent US real estate firm, launched a new data center development unit with plans to build out gigawatts of capacity across the US and Canada. They claim a near-term development pipeline of USD 45 billion, totaling 5GW across the region. As AI and cloud computing require vast computational power and storage, data centers must be equipped with cutting-edge infrastructure, including high-density servers and advanced cooling systems. This specialized focus is accelerating the demand for data center equipment, such as advanced servers, networking devices, and energy-efficient solutions, thereby fueling market growth.

Strategic Insights

Market Segmentation Analysis

The North America data center equipment market can be analyzed through key

segments, including equipment type and tier type. By equipment type, the market is divided into servers, storage devices, cooling equipment, power distribution units (PDUs), racks, enclosures, and others. In 2024, the servers segment held the largest market share. Regarding tier type, the market is categorized into tier 3, tier 4, tier 1, and tier 2, with tier 3 also holding the largest share in 2024.

Market Outlook

The exponential growth in global data generation and consumption, driven by big data analytics, AI, cloud computing, and the Internet of Things (IoT), necessitates the establishment of more data centers for data storage, processing, and distribution. Consequently, there is a rising investment in data centers as businesses strive to enhance their infrastructure to meet the growing demands for data management. Notable instances include a joint venture among OpenAI, Softbank, and Oracle, which announced plans to invest USD 100 billion in AI infrastructure, potentially scaling up to USD 500 billion. This investment includes the construction of ten data centers, with one already underway in Abilene, Texas.

In January 2024, Amazon Web Services (AWS) disclosed plans to invest USD 10 billion to build two data center complexes, marking the largest capital investment in Mississippi's history. The significant increase in investments in new data centers will require advanced equipment, including servers, storage devices, cooling systems, and PDUs, which are essential for effectively managing large volumes of data.

Country Insights

The North America data center equipment market is composed of the US, Canada, and Mexico, with the US holding the largest market share in 2024. The demand for edge computing, machine learning, and AI is particularly strong in the US, necessitating solutions that offer faster development timelines, lower costs, and better capacity optimization. This has led to a rise in modular data centers, such as the one launched by Eaton in March 2024, which combines racks, cooling, and service enclosures to support high equipment loads.

Innovations in data center technologies are also driving demand for energy-efficient equipment. For instance, AWS introduced new data center components designed to handle next-generation AI workloads, including a novel mechanical cooling solution using direct-to-chip cooling.

Company Profiles

Key players in the North America data center equipment market include ABB Ltd, Legrand SA, Schneider Electric SE, Rittal GmbH and Co KG, Eaton Corp Plc, Dell Technologies Inc, Honeywell International Inc, Vertiv Group Corp., Delta Electronics Inc, and Cisco Systems Inc. These companies are employing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their offerings and increase market share.

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