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US Rugged Servers Market Forecast to 2030 - Country Analysis by Type (Universal and Dedicated) and End-User (Aerospace, Oil & Gas, Transportation, Manufacturing, Telecommunication, Mining, Energy, Agriculture, Logistics, Construction, and Others)

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Abstracts

The US rugged servers market was valued at US$ 170.80 million in 2022 and is expected to grow at a CAGR of 5.9% during the forecast period of 2022 to 2030 to reach US$ 269.55 million by 2030.

The demand for rugged servers is increasing in several industries, such as aerospace, defense, oil & gas, transportation, and mining, where there is a need for data storage and computing capabilities in remote and rugged locations. These servers are deployed in aircraft, military vehicles, mining sites, offshore platforms, and other rugged environments where regular servers may fail to function effectively. Rugged servers offer advanced shock absorption, enhanced cooling systems, and ruggedized connectors to ensure optimal performance and reliability in these challenging scenarios. The US, in particular, has a strong demand for rugged servers in military applications and aerospace industries, as rugged servers are majorly deployed to sustain extreme conditions, harsh weather, and vibrations. The growth of the market in the country is attributed to high investments by the US Department of Defense in IT modernization programs. For instance, Defense Department spending is expected to surge to US$ 842 billion in fiscal year 2024, up 3.2% over FY23, under the budget proposal released by the Biden administration.

Moreover, the increasing number of data centers, resulting in a demand for rugged products, including servers, is fueling the growth of the rugged servers market in the US. For instance, in May 2023, US-based Novva Data Centers, a state-of-the-art data

center company offering purpose-built data center facilities, announced to open a new data center in Storey County in late 2024. Similarly, in January 2023, Amazon Web Services made an announcement to spend US$ 35 billion on novel data centers in Virginia by 2040. Therefore, the increasing investment in data centers is expected to supplement the growth of the US rugged servers market in the US during the forecast period. Further, the rising demand for cloud-based solutions to reduce operating and capital expenditure incurred by companies that operate on-premises data centers is another major factor expected to drive the US rugged servers market size in the country.

Key players operating in US rugged servers market include Core Systems Inc, Crystal Group Inc, Trenton Systems Inc, Mercury Systems Inc., and Dell Technologies Inc, in 2022. Various other notable market players profiled in US rugged servers market are Systel Inc, CP Technologies LLC, ZMicro Inc, Sparton Corp, and NCS Technologies Inc.

Based on end-user, the US rugged servers market has been segmented into aerospace, oil & gas, transportation, manufacturing, telecommunication, mining, energy, agriculture, logistics, construction, and others. The aerospace segment dominated the US rugged servers market in 2022 and is expected to continue its dominance until 2030 in the US rugged servers market size. Modern-day aircraft fleets generate and transmit large volumes of data during travel. The rising demand for the storage and security of this data has led the aerospace industry players to adopt servers. Further, aircraft manufacturers are continuously developing aircraft models that can fly in harsh environmental conditions, including extreme temperatures, fluctuation in air pressurization, intense shock and vibration, and turbulence. Traditional servers may crash in such conditions while flying, whereas rugged servers can operate smoothly under any environmental circumstances. Thus, the demand for rugged servers is increasing with the continuously growing aerospace industry with rising aircraft orders and deliveries, and technological developments, among other parameters.

The COVID-19 pandemic severely affected several industries, such as aerospace, oil & gas, construction, manufacturing, and transportation. Also, the COVID-19 crisis adversely impacted the electronics & semiconductors industry in 2020, which affected the production of rugged servers in the US. In January 2021, according to a report published by the Electronics Component Industry Association, the pandemic hindered the supply chain, canceled trade events, delayed product releases, and disrupted many industry activities. Also, the US rugged servers market players had to temporarily discontinue their operations due to the imposition of lockdowns and business

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shutdowns. Further, the server manufacturers experienced delays in lead time, which negatively impacted the US rugged servers market growth in 2020.

However, in Q3 of 2020, as the lockdown restriction was slowly lifted, construction, manufacturing, transportation, mining, and other industrial activities also restarted. The growth of such activities also raised the need for robust and advanced rugged servers, which can efficiently and securely help store data even in harsh environments. This pushed the rugged servers market players in the US to develop more advanced rugged servers to cater to the customers' needs. For instance, in April 2021, Crystal Group, Inc. launched a new family of next-gen Crystal Group FORCETM (FG2) PCIe Gen4-enabled rugged servers. These servers are designed for optimal performance in the most unpredictable and remote environments. Also, they help deliver ultra-low latency and parallel processing to maximize the real-time speed and accuracy of demanding computational workloads, which include sensor fusion, unmanned systems, communication, and intelligence. Therefore, the US rugged servers market is expected to propel after COVID-19 pandemic.

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