

United States Data Center Power Market - Industry Outlook & Forecast 2023-2028

Market Report | 2023-08-29 | 299 pages | Arizton Advisory & Intelligence

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Report description:

The U.S. data center power market by investment is expected to grow at a CAGR of 5.89% from 2022 to 2028.

KEY TRENDS

The implementation of modular power infrastructure is set to deliver substantial operational cost savings for data centers over time. These modular systems are highly efficient, requiring less maintenance and offering space-saving advantages compared to conventional power infrastructure. With the growing adoption of intelligent real-time monitoring software, the importance of monitoring in data centers is on the rise. These advanced monitoring solutions incorporate automation and AI features, enabling them to anticipate maintenance requirements, predict component failures, and facilitate seamless automatic switchovers to ensure uninterrupted operations.

The utilization of free cooling techniques witnessed significant growth in recent years, particularly in regions with favorable climatic conditions. Facilities increasingly employ evaporative coolers to fulfill their cooling needs, improving energy efficiency and cost savings. Innovative designs, such as district heating, are expected to gain traction among data centers in states with colder climates. This approach leverages the excess heat generated by data centers, repurposing it for heating purposes, thereby promoting energy efficiency and sustainability.

SEGMENTAL ANALYSIS

- The U.S. data center power market witnessed substantial expansion owing to the surge in data center construction activities. Operators actively seek innovative, energy-efficient solutions to power their facilities. Significant investments are directed toward UPS systems within the power infrastructure segment. These systems play a crucial role in ensuring continuous and reliable power supply.
- Notably, the U.S. data center power market saw a rise in adopting UPS systems powered by valve-regulated lead-acid (VRLA) and lithium-ion technologies, reflecting the industry's focus on leveraging advanced UPS solutions to enhance efficiency and

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performance.

-□ Integrating modular power infrastructure within data centers presents a promising opportunity for long-term cost savings. These modular systems offer enhanced efficiency, lower maintenance requirements, and reduced space utilization, improving operational expenses over time. Facilities can optimize their energy consumption, streamline maintenance processes, and effectively manage their resources by leveraging the advantages of modularity. As a result, the incorporation of modular power infrastructure not only ensures reliable and efficient power delivery and contributes to cost-effective operations.

Segmentation by Electrical Infrastructure

- UPS Systems
- Generators
- Transfer Switches & Switchgears
- PDUs
- Other Electrical Infrastructure

Segmentation by UPS System Capacity

- ≤ 500 kVA
- 500-1,000 kVA
- $> 1,000$ kVA

Segmentation by Generator Capacity

- 0-1.5 MW
- 5-3 MW
- ≥ 3 MW

Segmentation by Tier Standards

- Tier I & II
- Tier III
- Tier IV

Segmentation by Geography

- Southeastern U.S.
- Midwestern U.S.
- Southwestern U.S.
- Western U.S.
- Northeastern U.S.

VENDOR ANALYSIS

Key Vendors Profiles

- ABB
- Caterpillar

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- Cummins
- Delta Electronics
- Eaton
- Legrand
- Rolls-Royce
- Schneider Electric
- STULZ
- Vertiv

Other Prominent Vendors

- AEG Power Solutions
- Advanced Energy (ARTESYN)
- AMETEK Powervar
- Black Box Network Services (AGC Networks)
- Bloom Energy
- Borri
- Bxterra Power Technology
- Canovate
- Chatsworth Products
- Cisco Systems
- Controlled Power Company
- Cyber Power Systems
- Dataprobe
- Delta Electronics
- Detroit Diesel Corporation
- EAE Elektrik
- Elcom International
- Enconnex
- Exide Technologies
- Fuji Electric
- Generac Power Systems
- Hewlett Packard Enterprise (HPE)
- Hitachi Hi-Rel Power Electronics
- HITEC Power Protection
- INNIO
- KOHLER
- Marathon Power
- Mitsubishi Electric
- Natron Energy
- Panduit
- Piller Power Systems
- Plug Power
- Riello Elettronica Group
- Rittal
- Saft
- Siemens

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- Socomec
- SolarEdge Technologies
- Tripp Lite
- Toshiba
- Virtual Power Systems
- VYCON
- WTI - Western Telematic
- Yanmar (HIMOINSA)
- ZAF Energy Systems
- ZincFive

KEY QUESTIONS ANSWERED:

- 1.□How big is the U.S. data center power market?
- 2.□What is the growth rate of the U.S. data center power market?
- 3.□Who are the key players in the U.S. data center power industry?
- 4.□Which region holds the most significant U.S. data center power market share?
- 5.□How many MW of power capacity is expected to reach the U.S. data center power market by 2028?

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