

Data Center Construction Market | Global Industry Analysis, Market Size, Share, Major Vendors, & Forecast 2023 | Arizton

The global data center construction market is anticipated to generate revenues of around \$45 billion by 2023, growing at a CAGR of more than 6% during 2017-2023

CHICAGO, IL, UNITED STATES, April 26, 2018 /EINPresswire.com/ -- Arizton's latest market research report on global [data center construction market](#) offers analysis on market size & forecast, market share, industry trends, growth drivers, and vendor analysis. The market study also includes insights on segmentation by electrical construction (UPS systems, generators, transfer switches & switchgear, rack PDU, and other electrical infrastructure), by mechanical construction (cooling systems, rack, and other infrastructure), by tier standard (Tier 1 & 2, Tier 3, and Tier 4), by general construction (building development, installation and commissioning services, building design, physical security, and DCIM), and by geography (North America, Europe, APAC, Latin America, and MEA).



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The construction of hyperscale data center by organizations such as Facebook, Google, Amazon Web Service, and Microsoft will augment the development of the global data center construction market.”

Harry, Sr. Analyst

The global data center construction market is driven by the development data centers in multiple locations spanning thousands of square feet area. Service providers such as Equinix, Digital Realty, CyrusOne, NTT Communication, ST Telemedia, Interxion, NEXTDC, and telecommunication providers across various countries are investing heavily to grow the broadband connectivity worldwide resulting in the development of the global data center construction market.

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Data Center Construction Market – Overview

The proliferation of the Internet and extensive use of desktop systems, smartphones, social media, wearable devices, and connected devices is propelling the demand in the global data center construction market. Leading business organizations are embracing innovative technologies such as

big data, cloud services, and IoT to stay competitive in the global market and boost revenues. Such changes are boosting internet traffic and propelling the need for better and modern facilities in the global market. Regions such as APAC and Middle East is expected to grow at the highest CAGR during the over the next few years in the global data center construction market. The construction of hyperscale data center by organizations such as Facebook, Google, Amazon Web Service, and Microsoft will augment the development of the global market. Additionally, colocation providers are also investing significantly in the construction of new facilities with area of over 200,000 square feet in the global market. The increasing focus on developing a digital economy by investing in submarine fiber cable and improving their rural and urban broadband connectivity is encouraging top operators to construct data center facilities in the global market. The market is witnessing a rise in greenfield, brownfield and modular facilities construction. The penetration of modular facilities is high in regions such as Latin America, Eastern Europe, Middle East, Africa, and parts of Southeast Asia.



Construction of new facilities of Tier 3 and Tier 4 standards in countries such as Brazil, Sweden, Norway, Finland, Ireland, Denmark, Canada, India, Japan, and South Korea will create new avenues of prominent operators in the global market. The increasing investments towards innovations to enhance the operational efficiency of the facility, reduce power consumption, and decrease carbon emission will transform the global market by 2023.

The research report also offers market size in square ft area and power capacity in megawatts (MW) across geographies and provides the detailed analysis by following segments:

Market Segmentation by Electrical Construction

- UPS systems
- Generators
- Transfer Switch and Switchgear
- Rack PDU
- Other Electrical Infrastructure

Modern UPS systems with battery monitoring technologies to transform the global data center construction market

The global data center construction market by electrical infrastructure is segmented into UPS systems, generators, transfer switches & switchgear, rack PDU, and other electrical infrastructure.

UPS systems dominated the majority of the market size in 2018, growing at a CAGR of over 6% during the forecast period. The development of rack level UPS systems is propelling the growth of this market segment in the global market. The implementation of modern UPS systems with battery monitoring controls to predict the possibility of failure and maintenance needs will transform the global market. The adoption of lithium-ion UPS systems facilities operators in developed countries to reduce the OPEX through reduced maintenance cost will create new avenues for leading vendors in the market. The continuous innovations in UPS solutions and growing demand for modern solutions in emerging nations will attribute to the growth of this segment in the global market.

Market Segmentation by Mechanical Infrastructure

- Cooling Systems

 - Rack

 - Other Infrastructure

Market Segmentation by Cooling Systems

- CRAC & CRAH Systems

 - Chillers

 - Cooling Towers & Dry Coolers

 - Economizer & Evaporative Coolers

 - Other Cooling Units

Market Segmentation by Cooling Technique

- Air-based Cooling Technique

 - Liquid-based Cooling Technique

 - Market Segmentation by Cooling Technique

 - Water-based Cooling Technique

 - Direct Liquid and Immersion Cooling Techniques

Adoption of free cooling systems will reduce energy costs in the global data center construction market

The mechanical construction segment in the global data center construction market is divided into cooling systems, rack, and other infrastructure. Cooling systems segment occupied the largest market share in 2017, growing at a CAGR of more than 5% during the forecast period. The extensive use of indirect evaporative cooler, air or water-side economizers, and free cooling chillers is driving the development of this market segment in the global market. The redundancy of cooling systems is N+1 or N+N configuration among tier 3 facilities in the global market. Major facilities in regions such as Southeast Asia, China, India, Australia, Middle East, Africa and Latin America prefer chilled water systems. The installation of partial air cooling systems through free cooling and dual water feeds solutions as part of on-site water treatment plants will transform the global market during the forecast period. The market is also witnessing increase in design and development of facilities that uses sea or lake water to cool the server heat.

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Market Segmentation by General Construction

Building Development
Installation & Commissioning
Building Design
Physical Security
DCIM

Investments in mega data center development projects to trend in the global data center construction market during forecast period

The global data center construction market by general construction is classified into building development, installation and commissioning services, building design, physical security, and DCIM. Building development segment dominated the market size in 2017, growing at a CAGR of over 4% during the forecast period. The development of modern facilities that can withstand earthquakes and floods while providing access to incoming and outgoing network fibers will revolutionize the construction of facilities in the global market. The increasing number of brownfield development and modular facilities projects with the installation of on-site renewable power sources such as wind and solar energy to partially or completely power operations will continue to trend in the global data center construction market over the next few years.

Market Segmentation by Tier Standard

Tier 1 and Tier 2
Tier 3
Tier 4

Facilities of Tier 3 standards in emerging nations to boost growth in the global data center construction market

The tier standard segment in the global data center construction market is categorized into Tier 1 & 2, Tier 3, and Tier 4. Tier 3 standards occupied majority of the market size in 2017, growing at a CAGR of over 5% during the forecast period. The growing need for tier 3 certification from Uptime Institute to attract customers and increase occupancy rate to up 80% up front will boost the growth of this segment in the global market. The growing deployment of modular facilities in the developing countries will include minimum of N+1 redundancy in power and cooling capacity to avoid power fluctuation and outages issue thereby, driving the requirement for tier 3 standards in these regions. The development of efficient infrastructure will enable vendors to attract more consumers and boost revenues in the global data center construction market.

Market Segmentation by Geography

North Americas
US
Canada

Europe
Western Europe
Eastern Europe
Nordic Region

APAC
China

Hong Kong
Australia
Singapore

Latin America

MEA

Increasing Investments in Latin America, Middle East, and Africa will attribute to the growth of the global data center construction market

The global data center construction market by geography is segmented into North America, Europe, APAC, Latin America, and MEA. Latin America occupied a significant market size in 2017, growing at a CAGR of around 11% during the forecast period. The increasing investments from colocation service providers, telecommunication service providers and hyperscale developers are augmenting the demand in the construction of the new facilities in the Latin American market. The growing construction of large and mega facilities with a power capacity of over 5MW will transform the market in the region over the next few years. Developing regions are fueling the demand for modular facilities projects in the global market. For instance, Flexenclosure entered the Latin America market in 2016 and is experience high interest from local service providers in building modular solutions thereby, creating new opportunities for leading vendors in the Latin American market.

Major Vendors in the Global Data Center Construction Market

By Data Center Construction Infrastructure Providers

ABB
Eaton
Rittal
Schneider Electric
STULZ
Vertiv
Caterpillar
Cummins

By Data Center Construction Contractors

AECOM
DPR Construction
HDR Architecture
Holder Construction
Jacobs Engineering Group
Mercury Engineering
M +W Group

By Other Prominent Infrastructure Providers

Airedale Air Conditioning
Alfa Laval
Altima Technologies (NetZoom)
Bosch Security Systems (Robert Bosch)
Condair Group
Delta Group
GE
HPE
Huawei
Legrand
Nlyte Software
Mitsubishi Electric Corporation
MTU On Site Energy
Socomec Group
Trane (Ingersoll Rand)

Other Prominent Data Center Construction Contractors

Arup Group
Cap Ingelec
Corgan
CSF Group
Fluor Corporation
Fortis Construction
Gensler
Gilbane Building Co.
Jones Engineering Group
KKR Investment Group
Morrison Hershfield
Mortenson Construction
Structure Tone
Syska Hennessy Group
Whiting-Turner Contracting

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