

Data Center Power Distribution Report - 2019

Part of the Cloud & Data Center Service Area Package

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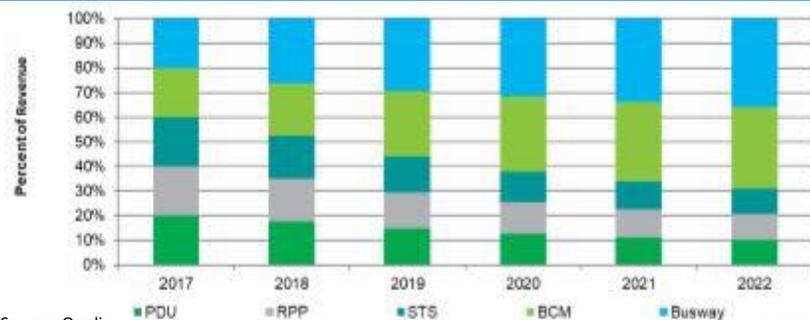
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This is the third edition of the Omdia, now a part of Informa Tech, report on the data center power distribution hardware market

The report features market size estimates across product type, power rating, breaker rating, sales channel, vertical market, and country segmentation. In addition to market statistics, this research contains in-depth analysis of factors affecting each region along with comprehensive market forecasts for each of the major product types through 2022.

This report was developed using a variety of sources, the core of which is composed of reported unit and revenue data from suppliers to the data center power distribution market, as well as 25+ in-depth interviews with vendors around the world. It provides a clear and concise outlook on the market, giving vendors and other industry stakeholders crucial insight into the opportunities and dynamics of the market over the forecast period.

Data Center Power Distribution Hardware by Product Type – World



Source: Omdia

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Report Coverage

KEY ISSUES ADDRESSED	COVERAGE	APPLICABLE TO
<ul style="list-style-type: none"> How big is the market for data center power distribution equipment in terms of revenue and units? How is the use of DC power in data centers affecting the market? Which countries are seeing the most data center power distribution growth? What market share do the top suppliers hold by product type and region? 	<p>Frequency, Time Period</p> <ul style="list-style-type: none"> 5-year annual forecast (2018–2022) Base year (2017) <p>Measures</p> <ul style="list-style-type: none"> Revenues Unit shipments Average unit prices <p>Market share analysis for each major:</p> <ul style="list-style-type: none"> Product type PDU by power rating RPP by breaker rating Sales channel Vertical market <p>Products covered</p> <ul style="list-style-type: none"> Three-phase, transformer-based PDU Remote power panels Static transfer switches Overhead busway Branch circuit monitoring 	<p>Segmentations presented</p> <ul style="list-style-type: none"> PDU by power rating and distribution voltage RPP by breaker rating and distribution voltage Sales channel (5 categories) Vertical market (12 industries) Application (small, medium, large, and prefabricated/modular data centers) Three-phase, transformer-based PDU Remote power panels Static transfer switches Overhead busway Branch circuit monitoring <p>Other Topics</p> <ul style="list-style-type: none"> Power density Energy efficiency Alternative distribution voltages Economic impact Two-stage power distribution The impact of colocations Competitive environment DC power <p>Regions</p> <ul style="list-style-type: none"> Americas EMEA Asia (China, India, Japan, Oceania, South Korea, Taiwan, Southeast Asia, Rest of Asia)
		<ul style="list-style-type: none"> Suppliers of data center power distribution hardware products Contract manufacturers Component suppliers System integrators IT distributors, datacomm distributors, and industrial/electrical distributors

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ABOUT OMDIA

Omdia is a global technology research powerhouse, established following the merger of the research division of Informa Tech (Ovum, Heavy Reading, and Tractica) and the acquired Omdia technology research portfolio.* We combine the expertise of more than 400 analysts across the entire technology spectrum, covering 150 markets. We publish over 3,000 research reports annually, reaching more than 14,000 subscribers, and cover thousands of technology, media, and telecommunications companies. Our exhaustive intelligence and deep technology expertise enable us to uncover actionable insights that help our customers connect the dots in today's constantly evolving technology environment and empower them to improve their businesses—today and tomorrow.

*The majority of Omdia technology research products and solutions were acquired by Informa in August 2019 and are now part of Omdia.

Report Coverage

Introduction, Scope, and Methodology

The scope of this report encompasses the total world market for three-phase power distribution hardware. The equipment covered is located only in the data center, downstream of the UPS in the area known as the “white space.” The hardware products discussed in this study include: three-phase transformer-based power distribution units, remote power panels, static transfer switches, branch circuit monitoring, and overhead busways.

Market size estimates are built using a “bottoms-up” approach based on revenue data from suppliers to the market as well as over 25 interviews with industry personnel. Forecasts are then created based on this primary research in addition to other relevant IHS Markit | Technology data center infrastructure reports, global economic data, and other secondary research.

In addition to market statistics, this report presents the assumptions supporting the forecasts. Other qualitative content addresses the drivers and inhibitors of market growth, product trends, and a discussion of the competitive environment. Market share information is presented for the three major geographical regions as well as each product type.

Each major region (Americas, EMEA, Asia) is analyzed by:

Product type

- Three-phase transformer-based power distribution units (PDU)
- Remote power panels (RPP)
- Static transfer switches (STS)
- Branch circuit monitoring (BCM)
- Overhead busway

PDU/RPP segmentation

- Power rating/main breaker rating
- Distribution voltage

Sales channel

- Direct to end user
- Design engineer/contractor
- IT distributor
- Datacomm/electrical distributor Other

Vertical market

- Cloud/IT services
- Colocation
- Content delivery/networks
- Content providers/media
- Education

- Energy/utilities
- Financial/insurance
- Government
- Healthcare
- Manufacturing/industrial
- Retail
- Transportation
- Other

Application

- Small data center
- Medium data center
- Large data center
- Prefabricated modular data center

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