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APAC Data Center Market - Industry Outlook and Forecast 2021-2026

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this APAC Data Center Market Report

The APAC data center market by revenue is expected to grow at a CAGR of approx. 6% during the period 2021–2026.

The APAC data center market share has been witnessing exceptional growth since the outbreak of the COVID-19 pandemic, which has increased the access to internet-related services aided by lockdowns and restrictions imposed by government agencies across the region. Colocation service providers witnessed a strong uptake of data center spaces by existing customers owing to the growth in demand during the pandemic. Due to the emergence of a new business environment, cloud service providers and video conferencing service providers have significantly contributed toward colocation and data center services. In Japan, the data center construction witnessed no impact due to the pandemic, however, data center operators implemented stringent precautionary regulations for the safety of their employees. Similarly, in India, a country-wide lockdown lasted for around 60 days with a majority of operations performed via online and remote mediums, which increased internet users by 25%. Hence, the market witnessed a strong spike in the announcement of new projects across India, China, Malaysia, and Japan in Q3 2020.

The following factors are likely to contribute to the growth of the APAC data center market during the forecast period:

Implementation of 5G Network triggering Edge Data Center Investments

Procurement of Renewable Energy

Installation of Innovative Data Center Technology

Artificial Intelligence Enhances Liquid Immersion & Direct-to-Chip Cooling Adoption

The study considers the present scenario of the APAC data center market and its market dynamics for the period 2020?2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

APAC Data Center Market Segmentation
The APAC data center market research report includes a detailed segmentation by IT infrastructure, electrical infrastructure, mechanical infrastructure, cooling technique, cooling systems, general construction, tier standards, Geography. The demand for high-performance computing infrastructure is increasing due to the adoption of IoT, artificial intelligence, and big data analytics in China and Hong Kong. The adoption of blade type servers is set to grow in China and Hong Kong. Over 90% of data centers in China have adopted blade servers for the high-density computing environment. The demand for supercomputers is also increasing with the adoption of digital currency in these countries. The IT infrastructure spending in Australia will be dominated by cloud-service providers, followed by enterprises, involving self-managed IT infrastructure solutions. Over 50% of the business IT budget is spent on the migration to cloud-based services in Australia, with IaaS spending leading the chart. In India, a rise in the cloud, big data, IoT, and artificial intelligence technology by enterprises is a major driver for the IT infrastructure market. Around 70% of start-ups in India are adopting IoT technology, with healthcare and manufacturing segments attracting the highest investment.

Megaprojects in China & Hong Kong data center market are designed to be of Tier III and Tier IV standards, which are leading to a high deployment of 2N redundant UPS systems. Multiple data center facilities with a power capacity of more than 10 MW are implemented in Australia, which is increasing the adoption of over 500 kVA capacity UPS systems. DRUPS systems are majorly adopted in the country. The demand for modular data center facilities deployed in Southeast Asian countries is high. The procurement of lithium-ion UPS is expected to grow in the region to avoid high OPEX on VRLA systems. The data center development is likely to be of higher capacity, typically

over 5 MW, requiring the adoption of 2N redundant backup systems owing to challenges related to power fluctuations and outages.

In China and Hong Kong, a majority of data centers adopt a combination of air and water-based cooling techniques to cool down facilities. However, a few facilities are built to support free cooling techniques. Data centers in India mainly use air-based and few facilities operate using water-based cooling systems. However, data centers are not completely suitable for free cooling. Few states in the country support free cooling of up to 1,000 hours annually. High air pollution levels in major cities across India could make free cooling an unfeasible option for operators. Most high-density environments are likely to consider water-based cooling systems, while small-scale deployments could operate through air-based cooling systems in the country. A majority of data centers in Singapore are designed to adopt water-based cooling techniques. The growth of data center construction market in APAC will aid in the development of facilities that would comprise multiple chillers, cooling towers, and CRAH units with N+N redundant configuration.

In terms of general construction, China leads greenfield construction. Hong Kong is expected to witness largely brownfield developments due to the space shortage during the forecast period. A majority of the construction contractors are located in these countries. The increased interest to improve efficiency and reduce OPEX is driving data center operators to procure intelligent DCIM solutions for end-to-end monitoring of facilities in India. Most data centers developed in Malaysia during the forecast period are expected to be greenfield. The market also has a strong potential for growth among modular data center projects. The labor cost in Malaysia is cheaper than in Singapore. However, the availability of a skilled workforce will be a major challenge among providers.

In the APAC region, several under-developed projects fall under the Tier III category, and the trend is expected to continue during the forecast period, with several operators likely to shift to the Tier IV category. In terms of colocation, these facilities will cost higher per rack basis than Tier I and Tier II facilities. Most new data centers are designed as Tier III standards with a minimum of N+1 redundancy. Tier IV data centers are equipped with minimum 2N+1 redundancy in every infrastructure that makes the facility fault-tolerant, with some facilities having 2N+2 redundancy of infrastructures such as UPS systems and PDUs. Facebook, Apple, Microsoft, and Google are the major contributors to Tier IV data centers. These facilities generate more revenue for the APAC data center market, with focused investment on highly efficient cooling systems.

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By IT Infrastructure

- Servers
- Storage
- Network

By Electrical Infrastructure

- UPS Systems
- Generators
- Transfer Switches and Switchgears
- PDUs
- Other Electrical Infrastructures

By Mechanical Infrastructure

- Cooling Systems
  - CRAC & CRAH Units
  - Chiller Units
  - Cooling Towers, Dry Coolers, & Condensers
  - Economizers & Evaporative Coolers
  - Other Cooling Units
- Racks

Others Mechanical Infrastructure

By Cooling Technique

Air-based Cooling Technique

Liquid-based Cooling Technique

By General Construction

Core and Shell Development

Installation and Commissioning Services

Engineering and Building Designs

Physical Security

DCIM/BMS

By Tier Standards

Tier I &II

Tier III

Tier IV

INSIGHTS BY GEOGRAPHY

In terms of investment, China and Hong Kong are expected to account for over $34 billion by 2026. The data center construction market in China and Hong Kong is expected to increase due to the high demand for cloud-based services, big data analytics, and IoT. In 2020, the total investment was around $5 billion, with China accounting for 80%. Apple is investing over $1 billion to build its data center facilities in Guizhou and Ulanqab China. China and Hong Kong added a total data center area of

around five million square feet in 2020 along with an IT load of around 1 GW of power capacity. The increasing development and the implementation of a high-speed 5G network will boost the data center network market in China and Hong Kong.

By Geography

- APAC
  - China & Hong Kong
  - Australia & New Zealand
  - India
  - Japan
  - Rest of APAC
  - Southeast Asia
    - Singapore
    - Malaysia
    - Thailand
    - Indonesia
    - Other South Eastern Countries

INSIGHTS BY VENDORS

AWS, Microsoft, Alibaba, Tencent, IBM, Oracle, and Google continue to expand their base with the opening of cloud regions in the APAC region and a strong physical presence in China, Singapore, Australia, and India. These cloud service providers are the major adopters of high-density, mission-critical servers, storage infrastructure, and network infrastructure. The region is witnessing a massive increase in data usage by consumers through services offered by companies in the e-commerce, social media, and entertainment industries. Digital services offered by the BFSI and government

sectors are also key enablers for data growth in the APAC data center market.

Key Data Center Critical (IT) Infrastructure Providers

- Cisco
- Dell Technologies
- Hewlett Packard Enterprise (HPE)
- Huawei
- IBM
- Inspur

Key Data Center Support Infrastructure Providers

- ABB
- Eaton
- Rittal
- Schneider Electric
- STULZ
- Vertiv
- Caterpillar
- Cummins

Key Data Center Contractors

- AECOM

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Arup Group

Aurecon Construction

CSF Group

DSCO Group

Gammon Construction

Larsen & Toubro (L&T)

PM Group

Studio One Design Limited

NTT FACILITIES Group

Key Data Center Investors

AirTrunk Operating

Digital Realty

Equinix

GDS Holdings

Keppel DC

NTT Communications

NEXTDC

STT TELEMEDIA GDC

Shanghai Athub

Qnet Shanghai (Shanghai Qnet Networking Technology)

Other Prominent Critical (IT) Infrastructure Providers

Arista

Atos

Broadcom

Extreme Networks

Hitachi Vantara

Inventec

Juniper

Lenovo

NEC

NetApp

Oracle

Pure Storage

Quanta Cloud Technology (Quanta Computer)

Super Micro Computer

Wistron Corporation (Wiwynn)

Other Prominent Data Center Support Infrastructure Providers

Airedale Air Conditioning

Alfa Laval

Asetek

Bosch Security Systems (Robert Bosch)

Cyber Power Systems

Delta Group

Euro-Diesel (KINOLT)

Green Revolution Cooling (GRC)

Hitech Power Protection

KOHLER (SDMO)

Legrand

Nlyte Software

Mitsubishi Electric Corporation

MTU On Site Energy (Rolls-Royce Power Systems)

Socomec Group

Trane (Ingersoll Rand)

Other Prominent Data Center Contractors

Chung Hing Engineers Group

AWP Architects

BYME Engineering Ltd.

Corgan

Cundall

DPR Construction

Faithful+Gould

Fortis Construction

Hutchinson Builders

ISG

Kienta Engineering Construction

Linesight

LSK Engineering

M+W Group (Excyte)

Nakano Corporation

Obayashi Corporation

Powerware Systems (PWS)

Sato Kogyo

Sterling and Wilson (Shapoorji Pallonji Group)

Red-Engineering

Other Prominent Data Center Investors

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21Vianet (Century Internet Data Center)

AIMS Data Centre

Airtel (Nxtra Data)

Bridge Data Centres

BDx (Big Data Exchange)

Canberra Data Centers

Chayora

Chindata

Colt Data Centre Services (COLT DCS)

CtrlS

Global Switch

Iron Mountain (IO)

Pi DATACENTERS

Princeton Digital Group (PDG)

Regal Orion

Space DC

SUNeVison (iAdvantage)

Sify Technologies

Tenglong Holdings Group (Tamron)

Yotta Infrastructure

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KEY QUESTIONS ANSWERED

1. What is the value of the APAC data center market during the period 2021- 2026?
2. What key factors and market trends are anticipated to drive the Asia Pacific data center market growth?
3. What are the restraints that the vendors are facing which challenge the growth of the Asia data center market?
4. Who are the key players in the APAC IT infrastructure market?
5. What are the key market opportunities and threats faced by new entrants in the data center market?
6. Which regions are expected to offer the highest business opportunities and growth for vendors during the forecast period?

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