

APAC Data Center Power Market - Industry Outlook & 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 Power Market - Industry Outlook and Forecast Report

APAC data center power market size by investments to reach USD 5,772.7 million by 2026, growing at a CAGR of 5.49% during 2021-2026

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

Increasing Hyperscale Constructions

Growing Rack Power Density

Increase in Power Outages

High Adoption of Innovative Data Center Technologies

APAC DATA CENTER POWER MARKET OUTLOOK

In the APAC region, countries with high population growth such as India and Indonesia are witnessing high demand for data storage. The major contributors in terms of power capacity are China, Hong Kong, India, Japan, Singapore, and Australia. The upcoming 5G technology installations in various countries will lead to higher demand for data center power, mostly in technology-driven countries in APAC. The data center market in APAC is mainly dominated by colocation providers, followed by internet and cloud

service providers.

The APAC region is among the fastest-growing regions with increased investments from global and local facilities operators. Government agencies in the APAC region across several countries are actively engaged in growth to digitize their operations. In APAC, the implementation of edge computing across various territories, particularly in China and India, accommodates the region's data growth.

The study considers the present scenario of the APAC data center power 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.

SNIPPETS

In May 2020, AWS announced utility-scale solar projects of around 100 MW to power its operations in China and around 105 MW in Australia.

The China & Hong Kong data center power market investment is expected to reach USD 2,533.1 million by 2026.

The APAC data center power industry is witnessing significant growth in the procurement of lithium-ion UPS systems.

The APAC data center power industry by

In October 2020, Keppel Data Centres signed an MOU with City Gas and City-OG Gas Energy Services to develop the hydrogen floating data center project. Commercial deployment of these innovative concepts will revolutionize the APAC data center power industry.

Korea Southern Power (KOSPO) is reviewing a feasibility study to develop a 230 MW hydropower plant, Maung, in Central Java, with investments of around \$650 million.

APAC DATA CENTER POWER MARKET SEGMENTATION

This research report includes a detailed segmentation by

Electrical Infrastructure

UPS Systems

Generators

Tier Standards

Geography

APAC DATA CENTER POWER MARKET SHARES AND SEGMENTS

UPS systems are being widely adopted to provide backup power for cooling systems installed in the facility. The APAC market by UPS systems is expected to reach USD 1,631.9 million by 2026.

The continuous construction of large and mega facilities across the globe will drive the industry for generators in the data center environment. The APAC data center power market by generators will grow at a CAGR of 4.85% in the upcoming years.

The industry is witnessing an increasing deployment of intelligent PDU solutions. This is due to more awareness of reducing power consumption and wastage.

Schneider Electric is among the major vendors that offer automatic transfer switches for data centers. With the increased construction of facilities across the region, transfer switches & switchgear industry is expected to grow during the forecast period.

Market Segmentation by Electrical Infrastructure

UPS Systems

Generators

Transfer Switches & Switchgears

Power Distribution Units

Other Electrical Infrastructure

Market Segmentation by UPS System

500-1,000 kVA UPS Systems

>1,000 kVA UPS Systems

Market Segmentation by Generators

1-2 MW Generators

>2 MW Generators

Market Segmentation by Tier Standards

Tier I & Tier II

Tier III

Tier IV

GEOGRAPHICAL ANALYSIS

Baidu, in China, had purchased 550 GWh of wind power to power its facilities in the Shangxi province.

China & Hong Kong are the prominent markets for data center operations in APAC. Apple is investing more than USD 1 billion in its facilities in Guizhou and Ulanqab, which will accelerate the growth. The increasing demand for cryptocurrency data centers in China is boosting the development of high-performance computing infrastructure.

Increasing the rack power density developed in the country will raise the demand for efficient power infrastructure.

The Australian government initiated 34 renewable energy projects to increase the generation of renewable energy, with solar energy as one of the major contributors. During the forecast period, installations of renewable energy sources such as solar are expected to grow, which would further reduce the power cost for data center operators.

Market Segmentation by Geography

China & Hong Kong

Australia & New Zealand

India

Japan

Rest Of APAC

Southeast Asia

VENDOR LANDSCAPE

The industry is witnessing growth in adoptions of generators with a power capacity of more than 2 MW. The revenue generation opportunity for the vendors is higher in the developed countries with the presence of major operators. The demand for software-defined power solutions by vendors is expected to drive growth in demand for automation and monitoring of power infrastructure. ABB, Caterpillar, Cummins, Eaton, Legrand, Schneider Electric, and Vertiv are some of the leading players in the region.

Key Power Infrastructure Vendors

ABB

Caterpillar

Cummins

Eaton

Legrand

Schneider Electric

Vertiv

Other Prominent Power Infrastructure Vendors

AEG Power Solutions

Anord Mardix

Advanced Energy Industries (ARTESYN)

Aten International

Austin Hughes Electronics

BACHMANN Group

Borri

Canovate Group

Centiel

Chatsworth Products

Cyber Power Systems

Delta Power Solutions (DELTA GROUP)

EAE

Elcom International

Enconnex

EverExceed Industrial

Exide Technologies

Fuji Electric

Generac Power Systems

General Electric (GE Gas Power)

Hewlett Packard Enterprise (HPE)

HIMOINSA (Yanmar Group)

Hitachi Hi-Rel Power Electronics

HITEC Power Protection

HITZINGER

Huawei Technologies

INNIO

Kehua Data (Kehua Tech)

Kirloskar Oil Engines Limited (KOEL)

KOHLER

Kokam (SOLAREEDGE)

Mitsubishi Electric

Panduit

Piller Power Systems

Powertek

Pramac (PR Industrial)

Rolls-Royce Power Systems

Riello Elettronica Group

Shenzhen Kstar Science & Technology

Saft (TOTAL)

Socomec

Thycon

Toshiba

VYCON

ZincFive

KEY QUESTIONS ANSWERED:

1. How big is the APAC data center power market?
2. Which segment accounted for the largest data center power market share in APAC?
3. What is the impact of COVID-19 in the APAC data center power market?
4. What are the key driving factors for the growth of the APAC data center power market?
5. Who are the top players operating in the data center power market in APAC?

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