

# Asia-Pacific (APAC) Hyperscale Data Center - 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 Hyperscale Data Center Market Report

The APAC hyperscale data center market by investment is expected to grow at a CAGR of 4.65% during 2021–2026.

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

Growing 5G Deployments Across Data Centers

Increasing M&As & Joint Ventures

Rising Adoption of Hyperscale Data Center Developments

Growing Cloud Services Adoption

## APAC HYPERSCALE DATA CENTER INDUSTRY INSIGHTS

The growing internet usage is increasing data generation, fueling increased data processing and storage facilities such as data centers. The growth in data generation in the region is also fueled by technology penetration such as cloud, big data, and IoT. Organizations are adopting these technologies in considerable numbers to gain an edge in market competitiveness. The APAC hyperscale data center market is fueled by construction from enterprise and colocation data center operators. Data center

operators are investing in expanding existing facilities and constructing new facilities across the region. In 2020, the APAC market witnessed investments in around 45 hyperscale data center facilities. China & Hong Kong witnessed around 21 hyperscale investments, followed by India, Japan, and Australia.

## SNIPPETS

In APAC, China & Hong Kong dominated the hyperscale data center market.

Greenfield development, especially for facilities with a data center space of over 50,000 square feet, will be very high among colocation providers.

The ODM market will continue to grow as hyperscale providers are currently expanding data center infrastructure by investing billions of dollars.

Australia & New Zealand hyperscale data center market by investment is expected to reach USD 3.65 billion by 2026.

Most hyperscale data centers will be equipped with N+N redundancy for cooling systems with a minimum of N+1 redundancy in other infrastructure for smooth functioning of the facilities.

In India, the data center market is witnessing strong growth supported by hyperscale investments from operators such as Colt Data Centre Services, Bridge Data Centres, Yotta Infrastructure Solutions (Hiranandani Group), NTT Global Data Centers, and ST Telemedia Global Data Centres.

## MARKET SHARE AND SEGMENTATION

The demand for servers suitable for cloud environments will continue to grow throughout the forecast period as service providers expand their presence in the region.

In 2020, the storage systems market was driven by the increased adoption of all-flash storage arrays with a sizable contribution from hybrid storage arrays.

The APAC hyperscale data center market by storage infrastructure is expected to reach USD 9.59 billion by 2026.

Innovations and advancements in UPS batteries are assisting in the growth of the APAC data center market.

The higher investment in hyperscale data centers for greater power capacity needs is expected to generate more revenue for the vendors during the forecast period.

The adoption of racks largely depends on the raised floor space of data centers. The APAC Hyperscale data center market by racks is expected to reach USD 0.41 billion by 2026.

Pump systems, ductworks, piping units, and valves are the major contributors to investment in the other infrastructure segment across the APAC data center industry.

The APAC Hyperscale data center market by cooling towers, condensers & dry coolers will grow at a CAGR of 3.88% in the upcoming years.

The air-cooling technique includes traditional CRACs and free cooling solutions. Free cooling solutions are gaining momentum over liquid-based cooling solutions.

The data center market in APAC is currently witnessing an increase in the construction of greenfield data center projects. The APAC hyperscale data center market by core & shell development is expected to reach USD 1.28 billion by 2026.

## Market Segmentation by Infrastructure

IT Infrastructure

Electrical Infrastructure

Mechanical Infrastructure

General Construction

## Market Segmentation by IT Infrastructure

Server Infrastructure

Storage Infrastructure

Network Infrastructure

## Market Segmentation by Electrical Infrastructure

UPS Systems

Generators

Transfer Switches & Switchgears

Power Distribution Units

Other Electrical Infrastructure

## Market Segmentation by Mechanical Infrastructure

Cooling Systems

Racks

Other Mechanical Infrastructure

## Market Segmentation by Cooling System

CRAC & CRAH Units

Chiller Units

Cooling Towers, Condensers & Dry Coolers

Economizers & Evaporative Coolers

Other Cooling Units

#### Market Segmentation by Cooling Techniques

Air-Based Cooling Technique

Liquid-Based Cooling Technique

#### Market Segmentation by General Construction

Core & Shell Development

Installation & Commissioning Services

Engineering & Building Design

Physical Security

DCIM/BMS Solutions

#### GEOGRAPHIC LANDSCAPE

The data center industry in APAC is growing YoY aided by strong growth in internet connectivity across the region. Hyperscale data center demand in China & Hong Kong will exceed supply due to the rising demand for cloud-based services, big data analytics, and IoT. China is a prominent market for data center operations in the APAC region. The continuous boom in technology innovation is driving the growth of the hyperscale data center market in APAC. The data center industry is witnessing a higher deployment of interconnection and cloud connectivity services. In 2020, the major hyperscale investors in Shanghai were GDS Services and OneAsia Network. The China & Hong Kong hyperscale data center market by investment will grow at a CAGR of 2.21% during the forecast period.

#### Market Segmentation by Geography

## APAC

China & Hong Kong

Australia & New Zealand

India

Japan

Rest Of APAC

Southeast Asia

## VENDOR LANDSCAPE

The demand for converged and hyper-converged solutions experienced substantial growth in the industry. Hewlett Packard Enterprise witnessed a strong demand for its mission-critical server product portfolio. The average selling price of Hewlett Packard Enterprise servers increased due to the rising cost of components. Hewlett Packard Enterprise is the leading vendor in the server market. The APAC hyperscale market is witnessing significant revenue contributions from ODM server manufacturers such as Quanta Systems (QCT), Wistron (Wiwynn), and Inventec. The storage market is migrating towards all-flash storage solutions. The industry is expected to become more competitive, owing to the decline in the prices of SSDs. Vendor offerings are concentrated on the cloud, big data, artificial intelligence, and IoT-based application workloads in the APAC hyperscale data center market share to gain high in the region.

## Prominent IT Infrastructure Vendors

Arista Networks

Atos

Broadcom

Cisco Systems

Dell Technologies

Extreme Networks

Hewlett Packard Enterprise (HPE)

Hitachi

Huawei Technologies

IBM

Inspur Group

Inventec

Juniper Networks

Lenovo

NEC

NetApp

Oracle

Pure Storage

Quanta Cloud Technology

Super Micro Computer

Wistron (Wiwynn)

## Prominent Support Infrastructure Vendors

ABB

Alfa Laval

Airedale International Air Conditioning

Asetek

Bosch Security and Safety Systems

Caterpillar

Condair Group

Cummins

Delta Group

Eaton

Green Revolution Cooling (GRC)

HITEC Power Protection

KOHLER

Legrand

Nlyte Software

Nortek Air Solutions

Mitsubishi Electric

Rolls-Royce Power Systems

Piller Power Systems

Rittal

Schneider Electric



STULZ

Trane

Vertiv Group

#### Prominent Construction Contractors

AECOM

Arup

Aurecon Group

AWP Architects

BYME Engineering

Chung Hing Engineers

Corgan

CSF Group

Cundall

DPR Construction

DSCO Group

Faithful+Gould

Fortis Construction

Gammon Construction

Hutchinson Builders

ISG

Kienta Engineering Construction

Larsen & Toubro Construction (L&T)

Linesight

Nakano Corporation

NTT FACILITIES

Obayashi

PM Group

RED

Sterling & Wilson

Studio One Design

#### Prominent Data Center Investors

Airtel (Nextra Data)

AirTrunk Operating

Apple

Amazon Web Services (AWS)

BDx (Big Data Exchange)

Bridge Data Centres

Canberra Data Centres

Chayora

Chindata

Colt Data Centre Services

CtrlS Datacenters

Digital Realty

Equinix

Facebook

GDS Services

Global Switch

Keppel Data Centres

NEC

NTT Global Data Centers

PCCW Global

Regal Orion

Shanghai Atrium (AtHub)

SpaceDC

ST Telemedia Global Data Centres (STT GDC)

Tenglong Holdings Group (Tamron)

Yotta Infrastructure Solutions (Hiranandani Group)

## New Entrants in APAC Hyperscale Market

AdaniConneX

Digital Edge DC

Hickory Group

Mantra Data Centers

Pure Data Centres

Stratus DC Management

## KEY QUESTIONS ANSWERED:

1. How big is the APAC Hyperscale Data Center Market?
2. What are the latest opportunities in Hyperscale Data Center Market in APAC?
3. What is the impact of COVID-19 on Hyperscale Data Centers?
4. Which region will have the highest market share in APAC Hyperscale Data Center?
5. Who are the Key Vendors in APAC Hyperscale Data Center?

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