

Data Center Colocation Market - Global Outlook & Forecast 2021-2026

<https://marketpublishers.com/r/D2393343444EN.html>

Date: November 2021

Pages: 926

Price: US\$ 4,495.00 (Single User License)

ID: D2393343444EN

Abstracts

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

The data center colocation market by investment is expected to grow at a CAGR of 4.40% during the period 2020–2026.

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

Rising Adoption of Renewable Energy by Colocation Providers

Adoption of 5G is Growing Demand for Edge Data Centers

Growing Adoption of Li-Ion Batteries & Fuel Cells

Rising Hyperscale Deployments by Colocation Providers

DATA CENTER COLOCATION INDUSTRY INSIGHTS

The colocation market is attractive, with data centers offering a higher return on investment (ROI) than other commercial and industrial properties. In 2021, the increase in digitalization is due to the pandemic, several initiatives taken by different countries, and the deployment of technology such as IoT, big data, 5G, and edge. The rising investment by cloud service providers across various geographies is accelerating the colocation industry globally.

KEY HIGHLIGHTS

COVID-19 has been a catalyst to digitalization initiatives and a solid boost to colocation market growth.

An increase in digitalization across businesses will continue to grow the data center investment from colocation services.

The rack power density is expected to grow from an average of 4?6 kW in 2020 to about 10?12 kW in 2026 due to the increased high-performance infrastructure deployment.

DATA CENTER COLOCATION MARKET SEGMENTATION

This research report includes a detailed segmentation by:

Colocation Services

Infrastructure

Electrical Infrastructure

Mechanical Infrastructure

General Construction

Tier Standards

Geography

MARKET SHARES & SEGMENTS

Colocation services in data centers are offered through retail and wholesale colocation. In terms of market share, the retail segment continues to dominate the market with around 70% of the market share.

Retail colocation services are likely to grow as several enterprises in developing countries are shifting from traditional server room infrastructure to data centers.

Market Segmentation by Colocation Services

Retail Colocation

Wholesale Colocation

Market Segmentation by Infrastructure

Electrical Infrastructure

Mechanical Infrastructure

General Construction

Market Segmentation by Electrical Infrastructure

UPS Systems

Generators

Transfer Switches & Switchgear

PDU's

Other Electrical Infrastructure

Market Segmentation by Mechanical Infrastructure

Cooling Systems

CRAC & CRAH Units

Chiller Units

Cooling Towers

Condensers & Dry Coolers

Economizers & Evaporative Coolers

Other Cooling Units

Racks

Other Mechanical Infrastructure

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

Market Segmentation by Tier Standards

Tier I & II

Tier III

Tier IV

GEOGRAPHY ANALYSIS

North America is among the top locations in terms of colocation facility market growth. In Canada, cloud providers are seeing volatile growth over the past 2?3 years, resulting in significant growth for wholesale data center providers. In the US, Virginia, Texas, and California are the major markets for colocation operations, followed by Illinois, Georgia, Nevada, and Oregon. Canada is an upcoming market owing to its accessibility to renewable energy sources and low power costs.

Market Segmentation by Geography

North America

US

Canada

Latin America

Brazil

Other Latin American Countries

Western Europe

UK

Germany

Netherlands

France

Ireland

Switzerland

Italy

Spain

Other Western European Countries

Nordics

Denmark

Sweden

Norway

Finland & Iceland

Central & Eastern Europe

Russia & Czech Republic

Poland & Austria

Other Central & Eastern European Countries

Middle East

UAE

Saudi Arabia

Turkey

Other Middle Eastern Countries

Africa

South Africa

Kenya

Other African Countries

APAC

China & Hong Kong

Australia & New Zealand

India

Japan

Rest of APAC

Southeast Asia

Singapore

Indonesia

Malaysia

Thailand

Other Southeast Asian Countries

COMPETITIVE LANDSCAPE

Prominent Data Center Colocation Providers

21Vianet Group

China Telecom

Colt Data Centre Services (COLT DCS)

Compass Datacenters

CoreSite Realty

CyrusOne

Digital Realty

Equinix

GDS Services

Global Switch

NTT Global Data Centers

QTS Realty Trust

ST Telemedia Global Data Centres (STT GDC)

Vantage Data Centers

Other Prominent Data Center Colocation Providers

3data

365 Data Centers (STONECOURT CAPITAL)

AirTrunk Operating

Aligned

American Tower

AQ Compute

Archer Datacenters

Aruba

AT TOKYO

Bahnhof

BDx (Big Data Exchange)

Bulk Infrastructure

Bridge Data Centres

Canberra Data Centres

Chayora

China Mobile International

China Unicom

Chindata

Chunghwa Telecom

Cologix

COPT Data Center Solutions

CtrlS Datacenters

Cyxtera Technologies

DATA4

DataBank

DigiPlex

EcoDataCenter

EdgeConneX

EdgeCore Internet Real Estate

Fibre Centre

fifteenfortyseven Critical Systems Realty

Flexential

GIGA Data Centers

GlobalConnect

Green Mountain

H5 Data Centers

HostDime

Internet Initiative Japan (IIJ)

Iron Mountain

KDDI

Keppel Data Centres

maincubes one

Millicom (TIGO)

NEXTDC

ODATA

Orange

PCCW Solutions

PLDT Enterprise

Pi Data Centers

Prime Data Centers

Princeton Digital Group (PDG)

Purecolo

Raxio Group

Regal Orion

Rostelecom

Sabey Data Center

Scala Data Centers

Shanghai Atrium (AtHub)

Sify Technologies

Singtel

Space DC

STACK INFRASTRUCTURE

Stream Data Centers

SUNeVision (iAdvantage)

Switch

T5 Data Centers

Telecom Italia Sparkle

Tenglong Holdings Group (Tamron)

Teraco Data Environments

TierPoint

Turkcell

Urbacon Data Centre Solutions

US Signal

Wingu

WORLDSTREAM

Yandex Cloud

Yotta Infrastructure Solutions (HIRANANDANI GROUP)

Zayo Group

New Entrants

ADANICONNEX (Adani Enterprises)

Cirrus Data Services

CloudHQ

Digital Edge

Echelon Data Centres

EdgeMicro

EdgeX Data Centers

Element Critical

Global Technical Realty

IXAfrica

Mantra Data Centers

Nowva

PointOne

Quantum Loophole

Stratus DC Management

KEY QUESTIONS ANSWERED:

1. How big is the data center colocation market?
2. Which region held the largest share in the data center colocation market?
3. Which segment accounted for the highest share in the data center colocation industry?
4. What are the factors driving the data center colocation market?
5. Who are the key players in the data center colocation industry?
6. What are the latest trends in the Data Center Colocation Market?

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