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Data Center Colocation Market in APAC - 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 Colocation Market Report

The APAC data center colocation market by investment is expected to grow at a CAGR of over 5% during the period 2020–2026.

The demand for colocation has increased due to the COVID-19 pandemic. Increased access to internet-related services aided by nationwide lockdowns imposed by governments across APAC has driven service providers to increase their colocation spaces. Organizations in IT services, BFSI, hospitals, and education sectors have initiated remote working for employees. Government agencies adopted cloud-based services where the confidential data of the state is stored securely. Moreover, the dependence of the education sector on the online teaching model has increased the demand for colocation services. The need for video-conferencing platforms such as Zoom, Webex, and Google Meet has experienced a steep rise. The use of online shopping has increased significantly during the COVID-19 outbreak. Colocation service providers witnessed a strong uptake for data center spaces by existing customers owing to the growth of COVID-19-induced demand. The emergence of a new business environment in COVID-19 boosts cloud service providers, and video conferencing service providers have contributed to the colocation uptake. During the COVID-19 pandemic, cloud-service providers were the major contributors as they chose to host the data in colocation data centers instead of building their own data centers in the region.

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

Adoption of Increased Renewable Energy Sources among Colocation Providers

Growth in Rack Power Densities

Growth in Edge Data Center Demand

Increase in Lithium-Ion Batteries Procurement

The study considers the present scenario of the APAC data center colocation 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 Colocation Market Segmentation

The APAC data center colocation market research report includes a detailed segmentation by infrastructure, electrical infrastructure, mechanical infrastructure, cooling technique, service type, general construction, tier standards, geography. The electrical infrastructure market is likely to cross over USD 5 billion by 2026. Generators are the largest contributor to the market revenue due to the increased adoption of DRUPS systems. The adoption of UPS systems has become critical for operators and designers as they account for around 30% of facility failures. Most data centers deploy dual-power feed to overcome power outages and human errors in the deployment or maintenance stage. The adoption of intelligent PDU solutions such as metered and monitored PDU dominates the market. The use of managed and switched PDUs is likely to grow during the forecast period. The APAC mechanical infrastructure market is growing at a CAGR of approx. 5% during 2020–2026. The need to monitor and identify cooling hotspots, temperature levels, and equipment failures has increased significantly due to the growth in power outages, thereby increasing the demand for mechanical infrastructure.

Lithium-ion UPS solutions are likely to witness high adoption from colocation providers. Modular data center operators expect to procure lithium-ion UPS systems with less than 500 kW power capacity. The adoption of single-rack prefabricated data center solutions will include single-phase lithium-ion systems with a power capacity of less than 10 kVA. The adoption of DRUPS systems will continue to grow among data colocation centers in several APAC markets. Australia, New Zealand, Singapore, Indonesia, Thailand, and

Hong Kong have witnessed high acceptance for DRUPS systems. However, some countries are witnessing low adoption of standalone diesel generators. With the increased construction of data centers across APAC, the market for transfer switches and switchgear expects to grow during the forecast period. However, switches vary significantly based on capacity supported, cost, mean time between failures (MTBF), switching time, and design.

The use of CRAC units is higher among in APAC, and most facilities use air-based cooling systems. In China & Hong Kong, several colocation facilities adopt a combination of air and water-based cooling techniques for cooling purposes. Data centers in India mainly use air-based, and few facilities operate using water-based cooling systems. However, they are not completely suitable for free cooling. Few states in the country can support free cooling for up to 1,000 hours in a year. High air pollution levels in major cities across India could not make free cooling a feasible option for data center operators. The APAC market largely depends on facilities that continue to use CRAH and CRAC DX-water-cooled solutions. Most data centers in APAC are designed with N+N CRAC or CRAH units and are now built with flexible designs in which additional or high-power capacity units can be incorporated.

The APAC data center colocation market is currently witnessing an increase in the construction of greenfield data center projects. Singapore and Hong Kong are the countries that face significant space shortages for construction. Thus, the increasing construction of data centers will bring multiple global data center construction contractors to the market, which will provide substantial opportunities for contracts and sub-contractors in the region. Several facilities in China and Hong Kong have 24/7 on-site security officers, followed by CCTV surveillance. The use of AI and ML to manage data centers has gained higher attention among colocation providers. Many enterprises deploy AI-workloads, where maintaining efficiency has become a daunting task in recent times. Moreover, the use of AI and robot-monitoring systems expects to grow in the coming years.

The APAC data center retail colocation market expects to reach approx. USD 11 billion in 2026. The high demand for colocation services from developing countries is likely to drive the retail colocation market. Several enterprises and organizations shift from traditional server room infrastructure to data centers. Retail colocation services are witnessing an increase with in-house prefabricated facilities lack high-speed fiber connectivity and disaster recovery locations prerequisites. Hence, these inadequacies are likely to drive enterprises toward retail colocation services.

The majority of China and Hong Kong data centers that were opened and under construction in 2020 are Tier III certified in terms of design and construction. Similarly, in Australia and New Zealand, most facilities are Tier III certified. 12 out of the 15 colocation facilities that opened and under construction between 2020 and June 2021 are Tier III certified, with three facilities certified as Tier IV. Data centers in Japan are likely to adopt the Uptime Institute's Tier III or Tier IV design with a minimum of N+N redundancy in infrastructures. Most data centers developed in 2020 are of Tier III and Tier IV standards.

By Infrastructure

- Electrical
- Mechanical
- General Construction

By Electrical Infrastructure

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

By Mechanical Infrastructure

- Cooling Systems
  - CRAC & CRAH Units
  - Chiller Units

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Cooling Towers, Dry Coolers, & Condensers

Economizers & Evaporative Coolers

Other Cooling Units

Racks

Others Mechanical Infrastructure

By Cooling Technique

Air-based Cooling Technique

Water-based Cooling Technique

By Service Type

Retail

Wholesale

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

China and Hong Kong expect to contribute maximum revenue to the market, with the India data center market likely to grow a promising CAGR of over 8% during 2020–2026. China & Hong Kong are the prominent markets for data center operations in APAC. The demand for data center market is growing on account of the boom in internet users, growth in the gaming sector, the popularity of the e-commerce industry, and investments in the digitalization of enterprises. Tier-1 cities such as Beijing, Shanghai, Shenzhen, Guangzhou, and Hong Kong are the major data center markets. In terms of investment, 39 colocation facilities contributed an investment of over USD 3.55 billion, which included projects that opened in 2020 and that are under construction and expected to be operational by June 2021. Shanghai is a preferred location for the colocation area under development, followed by Langfang and Beijing.

By Geography

- India
- China & Hong Kong
- Australia & New Zealand
- India
- Japan
- Rest of APAC
- Southeast Asia
  - Indonesia

Malaysia

Thailand

Other Southeast Asian Countries

INSIGHTS BY VENDORS

In terms of investment, GDS Services was the major investor in the APAC data center colocation market in 2020, with multiple expansions and newly built projects across China. It has a market share of over 17% in the market. It invested majorly in Langfang and Shanghai, where it pumped in over USD 1 billion. Similarly, Equinix was another major investor in the APAC market in 2020 with a market share of 4.2% and invested over USD 370 million in six data centers in Singapore, Hong Kong, Tokyo, and Melbourne. The APAC data center colocation market is highly competitive, with many providers investing in new facilities and expanding their existing ones to accommodate the demand from customers. New entrants are investing in the construction of core and shell properties across the region. These new facilities expect to be fully commissioned within two years of initial build-out.

Prominent Data Center Colocation Service Providers

21Vianet Group

China Telecom

Digital Realty

Equinix

GDS Services

Global Switch

KDDI Corporation

Keppel Data Centres

NEXTDC

NTT Global Data Centers

Shanghai Atrium (AtHub)

ST Telemedia Global Data Centres

SUNeVision (iAdvantage)

Other Prominent Data Center Colocation Service Providers

AirTrunk Operating

AT TOKYO

BDx (Big Data Exchange)

Bridge Data Centres

Canberra Data Centres

Chayora

China Mobile

China Unicom

Chindata

Chunghwa Telecom

Colt Data Centre Services (COLT DCS)

CTRLS Datacenters

Internet Initiative Japan (IIJ)

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Iron Mountain (IO)

Internet Thailand Public Company (INET)

Katalyst Data Management

KT Corporation (Korea Telecom)

Neo Telemedia

PCCW Solutions

PLDT Enterprise

Pi Data Centers

Princeton Digital Group (PDG)

Telekomunikasi Indonesia

Regal Orion

Sify Technologies

Singtel

Beijing Sinnet Technology

Space DC

Tenglong Holdings Group (Tamron)

Yotta Infrastructure (Hiranandani Group)

VADS

New Entrants

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Digital Edge Ventures

Mantra Data Centers

Stratus DC Management

AdaniConneX

KEY QUESTIONS ANSWERED:

1. How big is the APAC data center colocation market?
2. What is data center colocation market growth?
3. How is the Asia Pacific data center colocation market segmented?
4. What impact does the coronavirus (COVID-19) pandemic have on the market?
5. Who are the prominent vendors in the APAC data center colocation market?

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2020?2026 ($ billion)

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