

Data Center Construction Market in Africa - Industry Outlook and Forecast 2020-2025

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Abstracts

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

The Africa data center construction market by revenue is expected to grow at a CAGR of close to 12% during the period 2019–2025.

The Africa data center construction market is witnessing significant growth, especially in South Africa, Morocco, Kenya, and Nigeria. The growing internet population has been a strong factor for growth. Government agencies across countries are looking to improve their digital economy. They are involved in a variety of smart city projects that fuel the growth of data centers and edge facilities throughout the region. African countries such as South Africa, Kenya, and Morocco have started taking initiatives for smart cities and plan to improve network coverage. Smart cities are urban development projects that integrate information technology and the Internet of things (IoT) using analytics and sensors to manage cities better. Data centers will be the major beneficiaries of smart cities and will require lots of connectivity, data storage, and computing power for analytics. Due to an increase in the use of connected devices by businesses and consumers, the concept of edge computing is gaining traction in the Africa data center construction market. This has led to the rising demand for high-bandwidth internet in many rural areas, thereby driving the need for the facilities.

The spread of COVID-19 has affected major countries that have data center operations in Africa. Few facilities are affected due to the slowdown in construction works owing to lockdowns and supply chain-related challenges. In Africa, the projects that are expected to open between Q1 2020 and Q4 2020 will be partially affected through supply chain-related challenges compared with construction halts.

Africa Data Center Construction Market Segmentation

The Africa data center construction market research report includes a detailed segmentation by electrical infrastructure, mechanical infrastructure, general construction, tier standards, and geography. The UPS and generator markets will continue to grow due to the increasing construction of large and mega data center facilities and inaccurate power grid connectivity. The power market is expected to witness significant growth due to the non-reliability of power grids in Africa. The increased need for data center solutions in the country is expected to fuel the demand for transfer switches and switchgear during the forecast period. UPS systems are experiencing a high adoption across the African continent as several countries are incorporated diverse energy sources to run the power infrastructure. The facilities are developed to support at rack density of up to 15 kW, with their average PUE being around 1.5. Service operators in Africa deploying modular data centers are likely to procure lithium-ion UPS systems with power capacities of less than 100 kVA. Also, 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 generators market is expected to grow because of the continuous construction of large and mega facilities in Africa. Data centers built in populated areas are concerned with carbon emission, which is likely to increase the adoption of efficient generator systems.

Africa is currently moving to the adoption of free-cooling chillers or evaporative coolers. The market for cooling systems in the country is likely to depend on the construction of mega and hyperscale facilities, primarily of 10 MW capacity. While several smaller facilities in Africa use DX-based CRAC units, medium and large data centers are installing CRAH units. Also, the implementation of air-cooled CRAC systems with cooling units that use refrigerants or glycol-based cooling is expected to grow during the forecast period. The facilities mostly adopt air cooling systems and energy-efficient chiller units. The development of hyperscale data centers is likely to adopt 2N CRAC or CRAH units, whereas other facilities are expected to go for N+N systems. The facilities are built with flexible designs, in which additional or high-power capacity units can be incorporated within days or weeks, depending on the customer's requirement. Chillers are used to facilitate water-based cooling, whereas the adoption of a water-based cooling technique is experiencing strong growth, contributing to a sizable share of the Africa data center construction market.

Most colocation facilities in Africa have installed physical security solutions ranging from perimeter to rack-guarded through CCTV cameras and biometric systems. Companies

have also adopted DCIM/BMS solutions that enable remote monitoring of entire data center operations. Most colocation facilities in Egypt are developed with support and funding by enterprise and government agencies. The market also lacks a skilled workforce for data center construction and operations, where the definite investments in greenfield projects are low. Hence, most service providers are developing modular facilities. In terms of security, facilities are equipped with physical security, biometric protection, CCTV surveillance, and fire detection alarms. The increasing OPEX will boost the implementation of DCIM solutions, and the rapid growth in colocation data centers will increase the investment in physical security systems in the Africa data center construction market.

In Morocco, data centers are certified as Tier III facilities in terms of design. The facilities in Egypt are mostly Tier III standard certified in terms of design and are developed to support at rack density of up to 15 kW, with their average PUE being around 1.5. In Nigeria, most facilities are certified Tier III facilities by the Uptime Institute in terms of data center design and construction. In terms of redundancy, most Nigerian data centers have both power and cooling infrastructure equipped with minimum N+1 redundant components.

Segmentation by Electrical Infrastructure

UPS Systems

Generators

Transfer Switches & Switchgears

PDU's

Other Electrical Infrastructure

Segmentation by Mechanical Infrastructure

Cooling Systems

CRAC & CRAH Units

Chiller Units

Cooling Towers & Dry Coolers

Other Units

Racks

Other Mechanical Infrastructure

Segmentation by General Construction

Building Development

Installation & Commissioning Services

Building Designs

Physical Security

DCIM

Tier Standard

Tier I & Tier II

Tier III

Tier IV

INSIGHTS BY GEOGRAPHY

South Africa is witnessing major data center development; cities such as Cape Town and Johannesburg are the preferred places for development. The market is witnessing high adoption of cloud-based solutions among enterprises. The country is rapidly emerging as a center for public and private cloud hosting, which is expected to fuel the facility development. Manufacturing, financial services, and healthcare sectors are

among the major contributors to data center investment as they are rapidly adopting cloud computing. The market will witness steady growth over the next few years, with internet penetration and adoption of technologies such as big data, IoT, and artificial intelligence fueling the Africa data center construction market growth.

Segmentation by Africa

South Africa

Morocco

Kenya

Egypt

Nigeria

Other Countries

INSIGHTS BY VENDORS

Multiple electrical infrastructure providers operate in the Africa data center construction market. The growing data center construction market is prompting providers to improve the efficiency of solutions that are currently being offered. Many countries in the region suffer from frequent power fluctuations and power outages. This will enable operators to adopt efficient power backup solutions, with UPS systems that offer over 95% efficiency. The market for VRLA UPS systems will continue to dominate the market; however, the share of VRLA UPS systems will start declining by the end of the forecast period as lithium-ion UPS systems become more affordable, thereby improving their adoption among end-users.

Prominent Data Center Support Infrastructure Vendors

ABB

Caterpillar

Cummins

Eaton

Shenzhen Envicool Technology

Legrand

MTU On Site Energy

Schneider Electric

STULZ

Rittal

Vertiv

Prominent Construction Contractors

Atkins

Aveng Grinaker

Concor

Edarat Group

Etix Everywhere

Future-tech

Huawei

ISG

Prominent Data Center Investors

Africa Data Centres (Liquid Telecom)

Amazon Web Services (AWS)

Icolo.io

Internet Technologies Angola (ITA)

Inwi

MDXI (MainOne)

N+ONE

Orange

Raxio Data Center

Rayan Data Center

Teraco Data Environments

KEY QUESTIONS ANSWERED:

1. What is the Africa data center construction market size and growth rate during the forecast period?
2. What are the factors impacting the growth of the Africa data center construction market share?
3. How is the growth of the cooling system segment influencing the growth of the Africa data center construction market?
4. Who are the leading vendors in the Africa data center construction market, and what are their market shares?
5. What is the impact of the COVID-19 pandemic on the Africa data center construction market shares?

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