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Data Center Construction Market in APAC - Industry Analysis and Forecast 2018-2023

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Abstracts

This market research report on APAC data center construction market offers analysis on market size & forecast, market share, industry trends, growth drivers, and vendor analysis. The market study also includes insights on segmentation by electrical infrastructure (UPS systems, generators, transfer switches & switchgear, rack PDU, and other electrical infrastructure), by mechanical infrastructure (cooling systems, rack, and other infrastructure), by tier standard (Tier 1 & 2, Tier 3, and Tier 4), by general construction (building development, installation and commissioning services, building design, physical security, and DCIM), and by country (China & Hong Kong, Australia, Singapore, Japan, India, and rest of APAC).

APAC Data Center Construction Market – Overview

The strong internet connectivity slowly spreading across various countries and exponential transformation of the e-commerce industries is attributing to the growth of the APAC data center construction market. The growing popularity of Internet-based services, use of smartphones, and social media platforms is revolutionizing the APAC market. The growing focus on establishment of submarine cables by government agencies, telecommunication providers, and enterprises will grow the investment in the construction of new facilities across the APAC market. The growing penetration of internet in countries such as Indonesia, Thailand, Philippines, Vietnam, Cambodia and countries in Pacific Island will boost the demand in the APAC market. The exponential use of desktop systems, smartphone penetration, social media, wearable devices, and connected devices has led to a 50 times increase in data generated in the APAC market. Colocation providers such as Global Switch, Equinix, Digital Realty, GDS Holdings, ST Telemedia, Telehouse, AirTrunk Operating and Singtel are making significant investments in the APAC market. The growing demand for cloud-based

services is creating lucrative opportunities for leading hyperscale operators and cloud hosting serviceproviders in the APAC market. The increasing investments to promote and establish fiber cables, improve rural and urban broadband connectivity, and aid in the establishment of new facilities that expedite technological advancements will transform the APAC data center construction market.

The rising number of M&A activities leading to the investment in millions of dollars towards facilities construction and expansion projects to accommodate the demand for services is promoting the development of the market in APAC. The deployment of edge computing locations after 2020 across multiple countries, especially China and India, to accommodate the data growth will boost revenues in the APAC market. The APAC data center construction market is estimated to generate revenue of around $12 billion by 2023, growing at a CAGR of over 9% during 2017-2023. The report will also provide market size analysis in terms of square feet area and power MW.

APAC Data Center Construction Market – Dynamics

The increasing number of submarine fiber cable deployments will propel the growth of the APAC data center construction market. The growing adoption of technologies such as cloud, big data, and IoT is driving the requirement for strong fixed broadband connectivity in the APAC region. Additionally, the government initiatives to improve the wireless connectivity through the deployment of high-speed 4G LTE networks in the APAC market will be major boost for the market growth. The development of submarine fiber cables that can transmit data at higher speeds with reduced latency is attracting new investments in the APAC market. The construction of cloud facilities by internet giants and the need for interconnection services is one of the major driving factors in the APAC region. For instance, Google is involved in more than 10 submarine cable projects that are likely to be operational by 2019, connecting various cities in APAC region. Such projects will propel the development of the APAC data center construction market during the forecast period.

APAC Data Center Construction Market – Segmentation

This market research report includes a detailed segmentation of the market by electrical construction, mechanical construction, tier standards, general construction, and geography.

APAC Data Center Construction Market – By Electrical Infrastructure

Innovations in UPS solutions to improve efficiency to remain a primary focus in the APAC data center construction market

The APAC data center construction market by electrical infrastructure is segmented into UPS systems, generators, transfer switches & switchgear, rack PDU, and other electrical infrastructure. UPS systems held the majority of the market share in 2017, growing at a CAGR of more than 9% during the forecast period. The growing interest among large and mega facilities to procure UPS systems of more than 750 kVA and small and medium facilities are procuring UPS systems with a capacity of less than 500 kVA will augment the growth of the APAC market. The adoption of modern UPS systems with battery monitoring controls to predict the possibility of failure and maintenance needs will propel the development of the APAC data center construction market. The leading vendors are also continually coming up with innovative UPS solutions that increase efficiency and reduce the cost to attract new consumers and gain larger market share.

APAC Data Center Construction Market – By Mechanical Infrastructure

Use of water-based cooling systems to continue to grow in the APAC data center construction market during forecast period

The mechanical infrastructure segment in the APAC data center construction market is categorized into cooling systems, rack, and other infrastructure. Cooling systems dominated the market share in 2017 and is expected to grow at a CAGR of around 9% during the forecast period. The increase in rack power density and unfavorable outside environment to support free cooling across many countries in the region is boosting the adoption of water-based cooling systems in the APAC market. The market is witnessing the adoption of N+1 or N+N redundant cooling among tier 3 facilitiesin the APAC market. The top operators are focusing on implementing efficient solutions to reduce their CAPEX and OPEX, conserve space, and reduce power supply to cooling units in the APAC market. The integration of cooling systems with accessories and system level monitoring controls will transform the APAC data center construction market.

APAC Data Center Construction Market – By General Construction

Installation and commissioning services for modular power components to grow in the APAC data center construction market

The APAC data center construction market by general construction is divided into building development, installation and commissioning services, building design, physical security, and DCIM. The installation and commissioning services segment occupied a significant market share in 2017, growing at a CAGR of over 9% during the forecast period. The growing popularity of modern facilities that require installation and commissioning services for power connectivity with the grid, network cabling, and heat transfer mechanism will propel the growth of this segment in the APAC market. The increase in average labor costs and increasing growth in Greenfield facilities will generate higher revenues for installation and commission service providers in the APAC market. The growing focus on reliability, efficiency, and scalability of facilities in the region will create lucrative opportunities for leading players on the APAC market.

APAC Data Center Construction Market – By Tier Standards

Tier 3 certification from Uptime Institute to attract consumers in the APAC data center construction market

The tier standards in the APAC data center construction market is classified into Tier 1 & 2, Tier 3, and Tier 4. Tier 3 segmented dominated the market share in 2017, growing at a CAGR of approximately 8% during the forecast period. The designing and deployment of new facilities of Tier 3 standards with a minimum of N+1 redundancy is attributing to the growth of this segment in the APAC market. The deployment of modular facilities with a minimum redundancy in power and cooling capacity to avoid power fluctuation and outages issue is gaining immense traction in the APAC market. Furthermore, it is estimated that a decline in pricing of efficient infrastructure will reduce the average square feet cost to around $680 in the APAC market during the forecast period.

APAC Data Center Construction Market – By Country

Mega facilities deployment in China and Hong Kong to generate revenues in the APAC data center construction market

The APAC data center construction market by countries is segmented into China & Hong Kong, Australia, Singapore, Japan, India, and rest of APAC. China and Hong Kong were the largest revenues generators in 2017, growing at a CAGR of around 10% during the forecast period. The growing number of hyperscale operators, colocation service providers, and cryptocurrency data center operators is driving the growth of the China and Hong Kong in the APAC market. Million dollar investments by telecommunication service providers such as Baidu, Alibaba, China Unicom, China

Telecom, and China Mobile will generate the demand for new facilities in the Chinese market. The growing demand for hybrid infrastructure services will also increase the construction of colocation facilitiesand encourage regional cloud service providers to establish multiple availability zones across the country. Moreover, the growth of media and content providers (Youku and Letv) in Hong Kong will create lucrative opportunities for leading operators in the APAC data center construction market over the next few years.

Key Vendor Analysis

The competition in the APAC data center construction market is driven by the presence of various international players. The top vendors are focusing on offering innovative products, especially those products that help to reduce power wastage and improve efficiency to attract more end-users in the APAC market. The growing demand for real-time monitoring and management solutions in facilities will create new investment opportunities for key service providers operating in the APAC market. The growing number of urban development projects will increase the competition levels in the region. The operators will have to collaborate with construction contractors, installation and commissioning service providers, and architectural and engineering firms to offer aftermarket services to major companies in the APAC data center construction market.

The major vendors in the market are:

- By Infrastructure Providers
  - ABB
  - Eaton
  - Huawei
  - Schneider Electric
  - STULZ
  - Vertiv
- By Construction Contractors

AECOM

Arup

Aurecon Construction

CSF Group

DSCO Group

M+W Group

Nikom Infrasolutions

NTT FACILITIES Group

The other prominent players in the APAC data center construction market are Alfa Laval, Caterpillar, Cummins, Delta Group, Fuji Electric, GE, HPE, Hitachi Hi-Rel Power Electronics, Legrand, Mitsubishi Electric Corporation, MTU On Site Energy, Rittal, Renovo Zhuhai, KSTAR, Toshiba, United Technology, Yanmar Group, AWP, DPR Construction, Commtech Asia, Corgan, LSK Engineering, Hutchinson Builders, Nakano Corporation, and Obayashi Corporation.

Key market insights include

1. The analysis of APAC data center construction market provides market size and growth rate for the forecast period 2018-2023.
2. It offers comprehensive insights on current industry trends, trend forecast, and growth drivers about the APAC data center construction market.
3. The report provides the latest analysis of market share, growth drivers, challenges, and investment opportunities.
4. It offers a complete overview of market segments and the regional outlook of APAC data center construction market.
5. The report offers a detailed overview of the vendor landscape, competitive analysis, and key market strategies to gain competitive advantage.

REPORT SNAPSHOT

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The APAC data center construction market size is expected to generate revenues of approximately $12 billion by 2023, growing at a CAGR of over 9% by 2017–2023.

The APAC data center construction market is driven by the increasing internet penetration across various countries and especially in India and China. The million dollar projects by AWS, Microsoft, Google, Baidu, Alibaba, and Apple will revolutionize the APAC data center construction market during the forecast period. The market research report provides in-depth market analysis and segmental analysis of the APAC data center construction market by electrical construction, mechanical construction, tier standards, general construction, and country.

Base Year: 2017

Forecast Year: 2018–2023

The report considers the present scenario of the APAC data center construction market and its market dynamics for the period 2018?2023. It covers a detailed overview of various APAC data center construction market growth enablers, restraints, and trends. The study covers both the demand and supply sides of the market. It also profiles and analyzes the leading companies and various other prominent companies operating in the APAC data center construction market.

Major Vendors in the APAC Data Center Construction Market

By Construction Infrastructure Providers

ABB

Overview

Product Offering

Key News

Eaton

Huawei

Schneider Electric

STULZ

Vertiv

By Construction Contractors

AECOM

Arup

Aurecon Construction

CSF Group

DSCO Group

M+W Group

Nikom Infrasolutions

NTT FACILITIES Group

Prominent Players in the APAC Data Center Construction Market

By Other Prominent Infrastructure Providers

Alfa Laval

Caterpillar

Cummins

Delta Group

Fuji Electric

GE

HPE

Hitachi Hi-Rel Power Electronics

Legrand

Mitsubishi Electric Corporation

MTU On Site Energy

Rittal

Renovo Zhuhai

KSTAR

Toshiba

United Technology

Yanmar Group

Other Prominent Construction Contractors

AWP

DPR Construction

Commtech Asia

Corgan

LSK Engineering

Hutchinson Builders

Nakano Corporation

Obayashi Corporation

Market Segmentation by Electrical Construction

UPS systems

Generators

Transfer Switch and Switchgear

Rack PDU

Other Electrical Infrastructure

Market Segmentation by Mechanical Infrastructure

Cooling Systems

Rack

Other Infrastructure

Market Segmentation by Cooling Systems

CRAC & CRAH Systems

Chillers

Cooling Towers & Dry Coolers

Economizer & Evaporative Coolers

Other Cooling Units

Market Segmentation by Cooling Technique

- Air-based Cooling Technique
- Liquid-based Cooling Technique
- Market Segmentation by Cooling Technique
- Water-based Cooling Technique
- Direct Liquid and Immersion Cooling Techniques

Market Segmentation by General Construction

- Building Development
- Installation & Commissioning
- Building Design
- Physical Security
- DCIM

Market Segmentation by Tier Standard

- Tier 1 and Tier 2
- Tier 3
- Tier 4

Market Segmentation by Geography

- China & Hong Kong

Australia

Singapore

Japan

India

Rest of APAC

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