

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

<https://marketpublishers.com/r/DC6A92B310CEN.html>

Date: June 2020

Pages: 309

Price: US\$ 4,250.00 (Single User License)

ID: DC6A92B310CEN

Abstracts

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

The data center construction market in Middle East Africa is expected to grow at a CAGR of over 5% during the period 2019–2025.

The data center construction market share in Middle East Africa is expected to grow on account of the growth in internet penetration, social media usage, and smart city initiatives across the region. The demand for cloud computing, big data, and IoT technologies is likely to emerge as a prominent driver for data center development in the Middle Eastern region. Countries across the Middle East are likely to witness the improvement in network connectivity via the installation of inland and submarine network connectivity.

The construction of traditional brick-and-mortar facilities is also growing along with the rising deployment of modular facilities. The data center market in Middle East is attracting significant investments in recent years, led by countries such as UAE, Bahrain, Qatar, Turkey, Jordan and Saudi Arabia.

South Africa continues to dominate the data center construction market in Africa. In 2019, Morocco witnessed higher investments followed by Egypt, Kenya, and Nigeria. Colocation and telecommunication service providers are major investors in Africa, followed by enterprises and governments agencies. The increase in internet penetration, smartphone users, and improvement in broadband connectivity is aiding the growth of data across African countries.

The following factors are likely to contribute to the growth of the data center construction market in Middle East Africa during the forecast period:

Availability of Renewable Energy Prompts Procurement Growth

Smart City Initiatives Leading Edge Data Center Deployments

Government Support to Boost Digital Economy in Middle East & Africa

Cloud Adoption Fueling Data Center Investments

The study considers the present scenario of the data center construction market in Middle East Africa and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The study offers both the demand and supply aspect of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Data Center Construction Market in Middle East Africa - Segmentation

This research report includes a detailed segmentation by, Electrical Infrastructure, general construction, mechanical infrastructure, tier standards, and geography. The adoption of lithium-ion batteries will emerge in the next two years in UAE and Saudi Arabia countries. However, the use of lithium-ion, will pick up in the next 3-4 years in Africa countries, as many operators start to build large and hyperscale facilities. The market for generators will continue to grow because of the continuous construction of large and mega facilities in the region. The adoption of Diesel Rotary Uninterruptible Power Supply (DRUPS) systems is also growing since these systems combine both battery and flywheel UPS topology and a diesel generator to provide backup power during outages.

Data centers operated in Middle East countries do not support the use of free cooling systems. The Middle Eastern data centers market is adopting water-based cooling systems. The direct liquid cooling and immersion cooling solutions are likely to emerge in the market through the deployment of artificial intelligence and machine learning workloads in IoT and big data environment.

The data center market in Saudi Arabia has the presence of both local and global data center contractors. The market lacks a strong skilled workforce to accommodate the

growing need for data center operational personnel. However, the facility investments are likely to increase the skilled workforce during the forecast period. The UAE will aid in the growth of greenfield projects as well as modular data centers. The country also has a strong presence of local as well as global data center contractors in the design, construction, installation, and commissioning services.

A majority of data center development in Turkey is greenfield type, whereas modular facilities are confined to enterprise on-premise deployments. In terms of construction, most colocation facilities in South Africa have installed physical security solutions, ranging from perimeters to video surveillance to biometric systems. The rapid growth in colocation data centers will increase the investment in physical security systems in the African market. Data center facilities in Morocco are installing 24X7 physical security with CCTV surveillance, and intrusion detection devices.

Currently, operators in Middle East & Africa are spending on infrastructure across Tier I and Tier II facilities, while focusing on adding redundant infrastructure for power. These data centers have a power capacity of less than 1 MW and are not involved in running mission-critical applications. A majority of under-developed projects across the region fall under the Tier III category. This trend is likely to continue during the forecast period.

Around eight data centers, which were opened in 2019, are of Tier III standard. About 10 Tier III data centers, which were under construction in 2019, are expected to open by Q1 & Q2 of 2020. Tier IV data centers are equipped with at least 2N+1 redundancy in every infrastructure that makes the facility fault-tolerant, with UPS systems and PDUs having 2N+2 redundancy. Amazon Web Services' data center in Bahrain is one of the major contributors to the Middle East Tier IV market.

Segmentation by Electrical Infrastructure

UPS

Generators

Transfer Switches & Switchgears

Rack PDUs

Other Electrical Infrastructure

Segmentation by Mechanical Infrastructure

Cooling Systems

CRAC & CRAH Units

Chillers

Cooling Towers & Dry Coolers

Other Units

Racks

Other Mechanical Infrastructure

Segmentation by General Construction

Building Development

Installation & Commissioning Services

Building Designs

Physical Security

DCIM

Segmentation by Tier Standards

Tier I & Tier II

Tier III

Tier IV

Insights By Geography

The demand for cloud computing, big data, and IoT technologies will be a predominant driver for data center development in the Middle Eastern region. The investment in the market is aided by the construction of facilities by telecommunication providers, enterprises, government, cloud, and colocation service providers. Similarly, the investment in Africa is growing significantly, aided by the construction of data centers by telecommunication providers, enterprises, government, cloud, and colocation service providers.

Over the last few years, the region witnessed interest from leading cloud service providers such as AWS and Microsoft. Huawei also has a strong presence in the market and provides modular data center solutions for enterprise and government agencies. The demand for cloud services is growing among SMEs in the African region. It is expected that over 50% of the organizations operating in the African region will shift to cloud services by 2025.

Segmentation by Geography

Middle East

Saudi Arabia

UAE

Turkey

Jordan

Other Middle East Countries

Africa

South Africa

Morocco

Egypt

Kenya

Nigeria

Other African Countries

Insights By Vendors

Multiple electrical infrastructure providers operate in the data center construction market in Middle East Africa. 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. Schneider Electric, Vertiv, and Huawei have a strong presence in the market.

Prominent Support Infrastructure Providers

ABB

Caterpillar

Cummins

Eaton

Euro-Diesel (KINOLT)

Hitech

Legrand

MTU On Site Energy

Schneider Electric

STULZ

Shenzhen Envicool Technology

Rittal

Vertiv

Prominent Construction Contractors

Atkins

Aveng Grinaker

Concor

Deerns

Edarat Group

Etix Everywhere

Enmar Engineering

Future-tech

Harinsa Qatar (HQ)

Huawei

ISG

ICS Nett

Laing O'Rourke

Linesight

McLAREN Construction Group

NOVA Mission Critical

Qatar Site and Power

Red-Engineering

Prominent Data Center Investors

Akbank

Amazon Web Services (AWS)

Batelco (Bahrain Telecommunications Company)

Equinix

Etisalat Group

Gulf Data Hub

Icolo.io

Internet Technologies Angola (ITA)

Inwi

Khanza

N+ONE

Raxio Data Center

Turkcell

Telecom Italia Sparkle

Teraco Data Environments

Key Questions Answered

1. What is the market size of the data center construction market analysis in Middle East Africa?
2. What are the factors impacting the growth of the data center construction market forecast in Middle East Africa?
3. What are the drivers, trends, and restraints in the market?
4. Who are the leading vendors and what are their market shares?

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