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Data Center Construction Market in Southeast Asia - Industry Outlook and Forecast 2019-2024

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Abstracts

The Southeast Asia data center construction market is expected to reach values of approximately $2 billion by 2024, growing at a CAGR of around 7% during 2018-2024. The research report also offers market size in square ft area and power capacity in megawatts (MW) across geographies.

The investment support from REITs will enable growth of infrastructure by local vendors and incentives from the government will be highly beneficial for continuous investment from both local and global data center developers in the Southeast Asian market.The Southeast Asia data center construction market is driven by increasing deployments across emerging regions such as the Philippines, Vietnam, Myanmar, Cambodia, and Laos. The adoption of water-based cooling systems and rack size of over 45U will lead to innovations in the Southeast Asia data center construction market. The market research report provides in-depth market analysis and segmental analysis of the Southeast Asia data center construction market by product, distribution channel, material, and geography.

The report considers the present scenario of the Southeast Asia data center construction market and its market dynamics for the period 2019 ?2024. It covers a detailed overview of various Southeast Asia data center construction market growth enablers, restraints, and trends. The study includes both the demand and supply sides of the Southeast Asia data center construction market. It also profiles and analyzes the leading infrastructure vendors, construction companies, and data center vendors along with other prominent Southeast Asia data center construction market participants.

Data Center Construction Market in Southeast Asia – Dynamics

Digitalization of business operation is driving the demand for cloud-based service adoption in the Southeast Asia. Governments in Southeast Asia is investment millions of dollars to improve their digital economy. Among the countries, Singapore is the only mature cloud market in Southeast Asia. Most of the organizations in Southeast Asia and other APAC countries operates through the cloud platforms hosted in the Singapore data centers. This is because that market has physical presence of major cloud service providers such as AWS, Microsoft, Google, Alibaba, Tencent, and IBM. With data center in Singapore, cloud providers can provide services to their customers across the APAC region.The majority of the investment in Southeast Asia is brought in by demand for technologies such as cloud-based computing and supported by government across various countries to grow their digital economy. The governments across all the Southeast Asian countries have created anentity to aid in the growth of digital economy that includes increasing network capacity, aiding business to adopt technology and encourage global data center investment into the country. In Southeast Asia, Singapore is investing significantly in connected reality.In the Southeast Asia region, the construction of data centers is experiencing significant growth. However, these data centers are mostly confined to major metro cities. In the Southeast Asia region, most data centers operate in major metros cities such as Singapore, Bangkok, Jakarta, Manila, Hanoi. There are also multiple facilities or disaster recovery space operated across the countries. Most of these facilities comprise of small area and low power capacity. These cities are also experiencing a high amount of investment in recent times, and more data centers are planned for 2019 and 2020.

Data Center Construction Market in Southeast Asia – Segmentation

This market research report includes a detailed segmentation of the market by electrical infrastructure, mechanical infrastructure, tier standards, general construction, and country.The Southeast Asia data center construction market by electrical infrastructure is classified into UPS systems, generators, transfer switches & switchgear, rack PDU, and other electrical infrastructure. Generators dominated the total market share in 2018, growing at a CAGR of more than 7% during the forecast period. The increasing adoption of generators by facilities operators is primarily to make sure that they operate at 100% availability irrespective of the change in incoming power from utility grids in the market.Flywheel-based UPS systems and lithium-ion UPS systems are gaining immense traction across several countries in the Southeast market. Switchgearcomprises a combination of switches, fuses, and circuit breakers to protect and isolate electrical infrastructure in the facilities in the market.

The mechanical infrastructure in the Southeast Asia data center construction market is

categorized into cooling systems, racks, and other infrastructure. Racks are the fastest growing segment in the market, at a CAGR of over 9% during the forecast period. The installation of racks as pre-assembled infrastructure along with rack PDUs, rack-level UPS, and IT infrastructure is fueling the growth of this segment in the global market.Free-cooling is not facilitated in this region and operators are looking for efficient solutions to reduce their CAPEX and OPEX, conserve data center space, and reduce power supply to cooling units in the market. The use of liquid-based cooling technique installations will boost the demand for other mechanical infrastructure in the Southeast Asia data center construction market.

The Southeast Asia data center construction market by building development is segmented into building development, installations and commissioning services, building designs, physical security, and DCIM. Building development segment occupied the majority of the total market share in 2018, growing at a CAGR of more than 5% during the forecast period. Building development primarily focuses on site selection, preparation, and area construction and concrete-based data center building with windows in the market.Physical security systems that comprise sensors integrated with the existing DCIM solutions for real-time remote monitoring benefits will revolutionize the market. DCIM solutions offer features to control power consumption, improve efficiency, and increase operational capabilities in the Southeast Asia data center construction market.

The standard tier segment in the Southeast Asia data center construction market is divided into Tier I &II, Tier III, and Tier IV. Tier IV facilities are the fastest growing segment in the Southeast market, at a CAGR of approximately 20% during the forecast period. The increasing number of hyperscale developers such as Facebook, Apple, Microsoft, and Google investing in Tier IV facilities is fueling the growth of this segment in the market.In the SEA region, several under-developed projects fall under the Tier III category. Most of the new data centers are being designed as per Tier III standards with a minimum of N+1 redundancy, which can be reconfigured with up to 2N+1 redundancy as and when the demand arises. Such deployments will boost investments in the Southeast Asia data center construction market.

Market Segmentation by Infrastructure

- Electrical
- Mechanical

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General construction

Market Segmentation by Electrical Infrastructure

UPS systems

Generators

Transfer Switch and Switchgear

Rack PDU

Other Infrastructure

Market Segmentation by Mechanical Infrastructure

Cooling Systems

Rack

Other Infrastructure

Market Segmentation by General Construction

Building Development

Installation & Commissioning

Building Design

Physical Security

DCIM

Market Segmentation by Tier Standard

Tier I and Tier II

Tier III

Tier IV

Data Center Construction Market in Southeast Asia – Country

The Southeast Asia data center construction market by country is segmented into Indonesia, Malaysia, Singapore, Thailand, and other countries. Singapore dominated the majority of market share in 2018, growing at a CAGR of over 4% during the forecast period. The increasing investments by Equinix, Singtel, ST Telemedia, Global Switch, Digital Realty, Keppel Data Centres, NTT Communications, 1-Net, Kingsland Data Center, NTT Communications, and Starhub is augmenting the growth of Singapore in the Southeast market.Malaysia has over 30 data center colocation facilities, and the count is growing with the addition of around five data center projects every year in the market. TCC Technology, NTT Communications, KIRZ, Servenet Solution, True IDC, and SUPERNAP (Switch) Thailand are investors across Thailand and fueling the growth of the Southeast Asia data center construction market.

Market Segmentation by Country

Indonesia

Malaysia

Singapore

Thailand

Other Countries

Key Vendor Analysis

The Southeast Asia data center construction market is prompting providers to improve the efficiency of the solution to attract the maximum number of consumers. Partnerships with local providers and modular datacenter offerings will enhance revenues for the

vendors operating in the market. The need for local service providers in installation, commissioning, and maintenance services will create job opportunities in the market. The increasing focus on innovations and pricing will boost the intensity of the competition level in the Southeast Asia data center construction market.

The major vendors in the Southeast Asia market are:

Infrastructure Providers

ABB

Schneider Electric

Vertiv

Caterpillar

Cummins

Delta Group

Eaton

Euro-Diesel

Fuji Electric

HPE

Hitachi Hi-Rel Power Electronics

Hitec Power Protection

Huawei

KOHLER Group

Legrand Group

Mitsubishi Electric

MTU ONSITE ENERGY (Rolls-Royce Power Systems AG)

Piller Systems

Rittal

Construction Company

Arup

AWP Architects

CSF Group

DSCO Group

Fortis Construction

Faithful+Gould

Flex Enclosure

Kienta Engineering Construction

M+W Group (Excyte)

NTTFACILITIES Group

PM Group

Powerware Systems (PWS)

Sato Kogyo

Data Center Investors

AIMS Data Centre

Biznet Data Center

CMC Telecom

Colt DCS

DCI Indonesia

Digital Realty

Equinix

Global Switch

GRAHA TEKNOLOGI NUSANTARA (GTN)

Indosat Ooredoo (Lintasarta)

Internet Thailand Public Company Limited (INET)

Keppel DC

Kepstar Data Center Management

NTT Communications

Philippine Long-Distance Telephone ALPHA (PLDT ALPHA)

PT Telekomunikasi Indonesia

Singtel

ST Telemedia Global Data Centres (STT GDC)

TCC Technology

True Internet Data Center (True IDC)

VADS Berhad

VNTT

XL Axiata

Key market insights include

1. The analysis of Southeast Asia data center construction market provides market size and growth rate for the forecast period 2019-2024.
2. It offers comprehensive insights on current industry trends, trend forecast, and growth drivers about theSoutheast Asia 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 ofSoutheast Asia data center construction market.
5. The report offers a detailed overview of the vendor landscape, competitive analysis, and critical market strategies to gain competitive advantage.

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Contents

1 RESEARCH METHODOLOGY

2 RESEARCH OBJECTIVES

3 RESEARCH PROCESS

4 REPORT COVERAGE

4.1 Market Definition
4.2 Base Year
4.3 Scope of Study
  4.3.1 Market Segmentation by Infrastructure
  4.3.2 Market Segmentation by Electrical Infrastructure
  4.3.3 Market Segmentation by Mechanical Infrastructure
  4.3.4 Market Segmentation by Cooling Systems
  4.3.5 Market Segmentation by Cooling Technique
  4.3.6 Market Segmentation by General Construction
  4.3.7 Market Segmentation by Tier Standards
  4.3.8 Market Segmentation by Geography

5 REPORT ASSUMPTIONS & CAVEATS

5.1 Key Caveats
5.2 Currency Conversion
5.3 Market Derivation

6 MARKET AT A GLANCE

7 INTRODUCTION

7.1 Impact of Internet Penetration in Southeast Asia
7.2 Data Center Site Selection Criteria

8 MARKET DYNAMICS

8.1 Market Growth Enablers
  8.1.1 Increased adoption of cloud-based services

8.1.2 Migration from in-house infrastructure to colocation & managed services
8.1.3 Growing awareness among government bodies to improve digital economy
8.1.4 Increase in rack power density and adoption of efficient infrastructure
8.1.5 YOY Impact of Market Growth Enablers
8.1.6 YOY Impact of Market Growth Enablers on Countries
8.2 Market Growth Restraints
8.2.1 Location constraints for data center construction
8.2.2 Budget constraints limiting operations of efficient data centers
8.2.3 Operational constraints due to power outages and fluctuations
8.2.4 Data center design constraints
8.2.5 YOY Impact of Market Growth Restraints
8.2.6 YOY Impact of Market Growth Restraints on Regions
8.3 Market Opportunities & Trends
8.3.1 Increased adoption of prefabricated data center solutions
8.3.2 Increasing investment in fiber connectivity
8.3.3 Hyperscale data centers promote renewable energy adoption
8.3.4 Big data and IoT demand to increase edge data center development
8.3.5 Emergence of lithium-ion batteries and fuel cells
8.3.6 YOY Impact of Market Opportunities & Trends
8.3.7 YOY Impact of Market Opportunities & Trends on Regions

9 DATA CENTER CONSTRUCTION MARKET IN SEA

9.1 Market Overview
9.2 Market Size & Forecast
9.3 Porter’s Five Forces Analysis
9.3.1 Threat of New Entrants
9.3.2 Bargaining Power of Suppliers
9.3.3 Bargaining Power of Buyers
9.3.4 Threat of Substitutes
9.3.5 Competitive Rivalry

10 MARKET BY INFRASTRUCTURE TYPE

10.1 Market Overview
10.2 Electrical Infrastructure
10.2.1 Market Overview
10.2.2 Market Size & Forecast
10.3 General Construction

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info@marketpublishers.com

10.3.1 Market Overview
10.3.2 Market Size & Forecast
10.4 Mechanical Infrastructure
10.4.1 Market Overview
10.4.2 Market Size & Forecast

11 ELECTRICAL INFRASTRUCTURE

11.1 Generators
11.1.1 Market Overview
11.1.2 Market Size & Forecast
11.2 UPS SYSTEMS
11.2.1 Market Overview
11.2.2 Market Size & Forecast
11.3 Transfer Switches & Switchgears
11.3.1 Market Overview
11.3.2 Market Size & Forecast
11.4 Rack Power Distribution Units
11.4.1 Market Overview
11.4.2 Market Size & Forecast
11.5 Other Electrical Infrastructure
11.5.1 Market Overview
11.5.2 Market Size & Forecast

12 MECHANICAL INFRASTRUCTURE

12.1 Cooling Systems
12.1.1 Market Overview
12.1.2 Market Size & Forecast
12.2 Racks
12.2.1 Market Overview
12.2.2 Market Size & Forecast
12.3 Other mechanical Infrastructure
12.3.1 Market Overview
12.3.2 Market Size & Forecast

13 COOLING SYSTEMS

13.1 CRAC and CRAH Units

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13.1.1 Market Overview
13.1.2 Market Size & Forecast
13.2 Chiller Units
13.2.1 Market Overview
13.2.2 Market Size & Forecast
13.3 Cooling Towers & Dry Coolers
13.3.1 Market Overview
13.3.2 Market Size & Forecast
13.4 Other Cooling Units
13.4.1 Market Overview
13.4.2 Market Size & Forecast

14 COOLING TECHNIQUE

14.1 Liquid-Based Cooling Techniques
14.1.1 Market Overview
14.1.2 Market Size & Forecast
14.2 Air-Based Cooling Techniques
14.2.1 Market Overview
14.2.2 Market Size & Forecast

15 GENERAL CONSTRUCTION

15.1 Building Development
15.1.1 Market Overview
15.1.2 Market Size & Forecast
15.2 Installation & commissioning Services
15.2.1 Market Overview
15.2.2 Market Size & Forecast
15.3 Building Design
15.3.1 Market Overview
15.3.2 Market Size & Forecast
15.4 Physical Security
15.4.1 Market Overview
15.4.2 Market Size & Forecast
15.5 DCIM
15.5.1 Market Overview
15.5.2 Market Size & Forecast

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info@marketpublishers.com

16 TIER STANDARDS

16.1 Overview of Tier Standards
16.2 Tier I & II
16.2.1 Market Overview
16.2.2 Market Size & Forecast
16.3 Tier III
16.3.1 Market Overview
16.3.2 Market Size & Forecast
16.4 Tier IV
16.4.1 Market Overview
16.4.2 Market Size & Forecast

17 BY GEOGRAPHY

17.1 Market Overview

18 SINGAPORE

18.1 Market Overview
18.2 Market Size & Forecast
18.3 Market Size & Forecast by Area
18.4 Market Size & Forecast by Power Capacity
18.5 Market by Type of Construction
18.5.1 Electrical Infrastructure: Market Size & Forecast
18.5.2 Mechanical Infrastructure: Market Size & Forecast
18.5.3 General Construction: Market Size & Forecast
18.6 Site Selection Criteria Analysis in Singapore

19 MALAYSIA

19.1 Market Overview
19.2 Market Size & Forecast
19.3 Market Size & Forecast by Area
19.4 Market Size & Forecast by Power Capacity
19.5 Market by Type of Construction
19.5.1 Electrical Infrastructure: Market Size & Forecast
19.5.2 Mechanical Infrastructure: Market Size & Forecast
19.5.3 General Construction: Market Size & Forecast

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info@marketpublishers.com

19.6 Site Selection Criteria Analysis in Malaysia

20 THAILAND

20.1 Market Overview
20.2 Market Size & Forecast
20.3 Market Size & Forecast by Area
20.4 Market Size & Forecast by Power Capacity
20.5 Market by Type of Construction
  20.5.1 Electrical Infrastructure: Market Size & Forecast
  20.5.2 Mechanical Infrastructure: Market Size & Forecast
  20.5.3 General Construction: Market Size & Forecast
20.6 Site Selection Criteria Analysis in Thailand

21 INDONESIA

21.1 Market Overview
21.2 Market Size & Forecast
21.3 Market Size & Forecast by Area
21.4 Market Size & Forecast by Power Capacity
21.5 Market by Type of Construction
  21.5.1 Electrical Infrastructure: Market Size & Forecast
  21.5.2 Mechanical Infrastructure: Market Size & Forecast
  21.5.3 General Construction: Market Size & Forecast
21.6 Site Selection Criteria Analysis in Indonesia

22 OTHER COUNTRIES

22.1 Market Overview
22.2 Market Size & Forecast
22.3 Market Size & Forecast by Area
22.4 Market Size & Forecast by Power Capacity
22.5 Market by Type of Construction
  22.5.1 Electrical Infrastructure: Market Size & Forecast
  22.5.2 Mechanical Infrastructure: Market Size & Forecast
  22.5.3 General Construction: Market Size & Forecast
22.6 Site Selection Criteria Analysis in other countries

23 COMPETITIVE SCENARIO

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23.1 Electrical Infrastructure
23.2 Mechanical Infrastructure
23.3 General Construction

24 PROMINENT INFRASTRUCTURE PROVIDERS

24.1 ABB
24.1.1 Overview
24.1.2 Product offerings
24.2 Schneider Electric
24.2.1 Overview
24.2.2 Product offerings
24.3 Vertiv
24.3.1 Overview
24.3.2 Product offerings
24.4 Caterpillar
24.4.1 Overview
24.4.2 Product offerings
24.5 Cummins
24.5.1 Overview
24.5.2 Product offerings
24.6 Delta Group
24.6.1 Overview
24.6.2 Product offerings
24.7 Eaton
24.7.1 Overview
24.7.2 Product offerings
24.8 Euro-Diesel
24.8.1 Overview
24.8.2 Product Offerings
24.9 Fuji Electric
24.9.1 Overview
24.9.2 Product offerings
24.10 Hewlett Packard Enterprise (HPE)
24.10.1 Overview
24.10.2 Product Offerings
24.11 Hitachi Hi-Rel Power Electronics
24.11.1 Overview

24.11.2 Product offerings
24.12 Hitec Power Protection
24.12.1 Overview
24.12.2 Product Offerings
24.13 Huawei
24.13.1 Overview
24.13.2 Product offerings
24.14 KOHLER Group
24.14.1 Overview
24.14.2 Product Offerings
24.15 Legrand Group
24.15.1 Overview
24.15.2 Product offerings
24.16 Mitsubishi Electric
24.16.1 Overview
24.16.2 Product Offerings
24.17 MTU ONSITE ENERGY (Rolls-Royce Power Systems AG)
24.17.1 Overview
24.17.2 Product offerings
24.18 Pillar Systems
24.18.1 Overview
24.18.2 Product Offerings
24.19 Rittal
24.19.1 Overview
24.19.2 Product offerings

25 PROMINENT CONSTRUCTION COMPANIES

25.1 Arup
25.1.1 Overview
25.1.2 Service offerings
25.2 AWP Architects
25.2.1 Overview
25.2.2 Service Offerings
25.3 CSF Group
25.3.1 Overview
25.3.2 Service offerings
25.4 DSCO Group
25.4.1 Overview

25.4.2 Service offerings
25.5 Fortis Construction
25.5.1 Overview
25.5.2 Service Offerings
25.6 Faithful+Gould
25.6.1 Overview
25.6.2 Product Offerings
25.7 Flex Enclosure
25.7.1 Overview
25.7.2 Service Offerings
25.8 Kienta Engineering Construction
25.8.1 Overview
25.8.2 Service Offerings
25.9 M+W Group (Excyte)
25.9.1 Overview
25.9.2 Service Offerings
25.10 NTT Facilities Group
25.10.1 Overview
25.10.2 Service offerings
25.11 PM Group
25.11.1 Overview
25.11.2 Service Offerings
25.12 Powerware Systems (PWS)
25.12.1 Overview
25.12.2 Service Offerings
25.13 Sato Kogyo
25.13.1 Overview
25.13.2 Service Offerings

26 DATA CENTER INVESTORS

26.1 AIMS Data Centre
26.1.1 Overview
26.1.2 Service Offerings
26.2 Biznet Data Center
26.2.1 Overview
26.2.2 Service Offerings
26.3 CMC Telecom
26.3.1 Overview

26.3.2 Service Offerings
26.4 Colt Data Centre Services (Colt DCS)
26.4.1 Overview
26.4.2 Service Offerings
26.5 DCI Indonesia
26.5.1 Overview
26.5.2 Service Offerings
26.6 Digital Realty
26.6.1 Overview
26.6.2 Service Offerings
26.7 Equinix
26.7.1 Overview
26.7.2 Service Offerings
26.8 Global Switch
26.8.1 Overview
26.8.2 Service Offerings
26.9 Graha Teknologi Nusantara (GTN)
26.9.1 Overview
26.9.2 Service Offerings
26.10 Indosat Ooredoo (Lintasarta)
26.10.1 Overview
26.10.2 Service Offerings
26.11 Internet Thailand Public Company Limited (INET)
26.11.1 Overview
26.11.2 Service Offerings
26.12 Kepple DC
26.12.1 Overview
26.12.2 Service Offerings
26.13 Kepstar Data Centre Management
26.13.1 Overview
26.13.2 Service Offerings
26.14 NTT Communications
26.14.1 Overview
26.14.2 Service Offerings
26.15 Philippine Long Distance Telephone ALPHA (PLDT ALPHA)
26.15.1 Overview
26.15.2 Service Offerings
26.16 PT Telekomunikasi Indonesia
26.16.1 Overview

26.16.2 Service Offerings
26.17 Singtel
26.17.1 Overview
26.17.2 Service Offerings
26.18 ST Telemedia Global Data Centres (STT GDC)
26.18.1 Overview
26.18.2 Service Offerings
26.19 TCC Technology
26.19.1 Overview
26.19.2 Service Offerings
26.20 True Internet Data Center (True IDC)
26.20.1 Overview
26.20.2 Service Offerings
26.21 VADS BERHAD
26.21.1 Overview
26.21.2 Service Offerings
26.22 VNTT
26.22.1 Overview
26.22.2 Service Offerings
26.23 XL Axiata
26.23.1 Overview
26.23.2 Service Offerings

27 REPORT SUMMARY

27.1 Key Takeaways
27.2 Qualitative Summary
27.3 Quantitative Summary
27.3.1 Overall Market
27.3.2 Market by Infrastructure
27.3.3 Market by Electrical Infrastructure
27.3.4 Market by Mechanical Infrastructure
27.3.5 Market by Cooling Systems
27.3.6 Market by Cooling Technique
27.3.7 Market by General Construction
27.3.8 Market by Tier Standards
27.3.9 Market in Singapore
27.3.10 Market in Singapore by Infrastructure
27.3.11 Market in Malaysia

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27.3.12 Market in Malaysia by Infrastructure
27.3.13 Market in Thailand
27.3.14 Market in Thailand by Infrastructure
27.3.15 Market in Indonesia
27.3.16 Market in Indonesia by Infrastructure
27.3.17 Market in Other Countries
27.3.18 Market in Other Countries by Infrastructure

28 APPENDIX

28.1 Abbreviations

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List Of Exhibits

LIST OF EXHIBITS

Exhibit 1 Segmentation of Data Center Construction Market in Southeast Asia
Exhibit 2 Market Size Calculation Approach 2018
Exhibit 3 Internet Penetration by Countries in Southeast Asia
Exhibit 4 Data Center Site Selection Criteria and Weightage
Exhibit 5 Cloud Service Providers by Country
Exhibit 6 Rack Power Density in Data Center Construction Market in SEA (2010–2024)
Exhibit 7 Data Center Construction Market in SEA 2018–2024 ($ million)
Exhibit 8 Data Center Construction Market in SEA by Area 2018–2024 (Million Square Feet)
Exhibit 9 Data Center Construction Market in SEA by Power Capacity 2018–2024 (MW)
Exhibit 10 Five Forces Analysis 2018
Exhibit 11 Data Center Construction Market in SEA by Infrastructure 2018 & 2024
Exhibit 12 Data Center Construction Market in SEA by Type
Exhibit 13 Data Center Construction Market Share in SEA by Type (%)
Exhibit 14 Data Center Electrical Infrastructure Market in SEA 2018–2024 ($ million)
Exhibit 15 Data Center General Construction Market in SEA 2018–2024 ($ million)
Exhibit 16 Data Center Mechanical Infrastructure Market in SEA 2018–2024 ($ million)
Exhibit 17 Data Center Construction Market in SEA by Electrical Infrastructure 2018 & 2024
Exhibit 18 Data Center Generators Market in SEA 2018?2024 ($ million)
Exhibit 19 Data Center UPS Systems Market in SEA 2018?2024 ($ million)
Exhibit 20 Data Center Transfer Switches & Switchgears Market in SEA 2018?2024 ($ million)
Exhibit 21 Data Center Rack PDU Market in SEA 2018?2024 ($ million)
Exhibit 22 Data Center Other Electrical Infrastructure Market in SEA 2018?2024 ($ million)
Exhibit 23 Data Center Construction Market in SEA by Mechanical Infrastructure 2018 & 2024
Exhibit 24 Data Center Cooling Systems Market in SEA 2018–2024 ($ million)
Exhibit 25 Data Center Rack Market in SEA 2018–2024 ($ million)
Exhibit 26 Data Center Other Mechanical Infrastructure Market in SEA 2018–2024 ($ million)
Exhibit 27 Data Center Construction Market in SEA by Cooling Systems 2018 & 2024
Exhibit 28 Data Center CRAC & CRAH Market in SEA 2018–2024 ($ million)
Exhibit 29 Data Center Chiller Units Market in SEA 2018–2024 ($ million)

Exhibit 30 Data Center Cooling Towers & Dry Coolers Market in SEA 2018–2024 ($ million)
Exhibit 31 Data Center Other Cooling Units Market in SEA 2018–2024 ($ million)
Exhibit 32 Data Center Construction Market in SEA by Cooling Technique 2018 & 2024
Exhibit 33 Data Center Liquid-based Cooling Market in SEA 2018–2024 ($ million)
Exhibit 34 Data Center Air-based Cooling Market in SEA 2018?2024 ($ million)
Exhibit 35 Data Center Construction Market in SEA by General Construction 2018 & 2024
Exhibit 36 Data Center Building Development Market in SEA 2018–2024 ($ million)
Exhibit 37 Data Center Installation & Commissioning Services Market in SEA 2018–2024 ($ million)
Exhibit 38 Data Center Building Design Market in SEA 2018–2024 ($ million)
Exhibit 39 Data Center Physical Security Market in SEA 2018–2024 ($ million)
Exhibit 40 Data Center DCIM Market in SEA 2018–2024 ($ million)
Exhibit 41 Data Center Construction Market in SEA by Tier Standards 2018 & 2024
Exhibit 42 Data Center Tier Standards
Exhibit 43 Data Center Tier I & II Facilities Construction Market in SEA 2018–2024 ($ million)
Exhibit 44 Data Center Tier III Facilities Construction Market in SEA 2018–2024 ($ million)
Exhibit 45 Data Center Tier IV Facilities Construction Market in SEA 2018?2024 ($ million)
Exhibit 46 Market Revenue of Various Regions 2018 & 2024 ($ million)
Exhibit 47 Market Share by Countries in SEA 2018–2024
Exhibit 48 Data Center Construction Market in Singapore 2018–2024 ($ million)
Exhibit 49 Data Center Construction Market in Singapore by Area 2018–2024 (Million Square Feet)
Exhibit 50 Data Center Construction Market in Singapore by Power Capacity 2018–2024 (MW)
Exhibit 51 Data Center Electrical Infrastructure Market in Singapore 2018–2024 ($ million)
Exhibit 52 Data Center Mechanical Infrastructure Market in Singapore 2018–2024 ($ million)
Exhibit 53 Data Center General Construction Market in Singapore 2018–2024 ($ million)
Exhibit 54 Data Center Construction Market in Singapore: Site Selection Criteria and Weightage
Exhibit 55 Data Center Construction Market in Malaysia 2018–2024 ($ million)
Exhibit 56 Data Center Construction Market in Malaysia by Area 2018–2024 (Million Square Feet)

Exhibit 57 Data Center Construction Market in Malaysia by Power Capacity 2018–2024 (MW)
Exhibit 58 Data Center Electrical Infrastructure Market in Malaysia 2018–2024 ($ million)
Exhibit 59 Data Center Mechanical Infrastructure Market in Malaysia 2018–2024 ($ million)
Exhibit 60 Data Center General Construction Market in Malaysia 2018–2024 ($ million)
Exhibit 61 Data Center Construction Market in Malaysia: Site Selection Criteria and Weightage
Exhibit 62 Data Center Construction Market in Thailand 2018–2024 ($ million)
Exhibit 63 Data Center Construction Market in Thailand by Area 2018–2024 (Million Square Feet)
Exhibit 64 Data Center Construction Market in Thailand by Power Capacity 2018–2024 (MW)
Exhibit 65 Data Center Electrical Infrastructure Market in Thailand 2018–2024 ($ million)
Exhibit 66 Data Center Mechanical Infrastructure Market in Thailand 2018–2024 ($ million)
Exhibit 67 Data Center General Construction Market in Thailand 2018–2024 ($ million)
Exhibit 68 Data Center Construction Market in Thailand: Site Selection Criteria and Weightage
Exhibit 69 Data Center Construction Market in Indonesia 2018–2024 ($ million)
Exhibit 70 Data Center Construction Market in Indonesia by Area 2018–2024 (Million Square Feet)
Exhibit 71 Data Center Construction Market in Indonesia by Power Capacity 2018–2024 (MW)
Exhibit 72 Data Center Electrical Infrastructure Market in Indonesia 2018–2024 ($ million)
Exhibit 73 Data Center Mechanical Infrastructure Market in Indonesia 2018–2024 ($ million)
Exhibit 74 Data Center General Construction Market in Indonesia 2018–2024 ($ million)
Exhibit 75 Data Center Construction Market in Indonesia: Site Selection Criteria and Weightage
Exhibit 76 Data Center Construction Market in Other Countries 2018–2024 ($ million)
Exhibit 77 Data Center Construction Market in Other Countries by Area 2018–2024 (Million Square Feet)
Exhibit 78 Data Center Construction Market in Other Countries by Power Capacity 2018–2024 (MW)
Exhibit 79 Data Center Electrical Infrastructure Market in Other Countries 2018–2024 ($ million)

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Exhibit 80 Data Center Mechanical Infrastructure Market in Other Countries 2018–2024 ($ million)
Exhibit 81 Data Center General Construction Market in Other Countries 2018–2024 ($ million)
Exhibit 82 Data Center Construction Market in Other Countries: Site Selection Criteria and Weightage

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List Of Tables

LIST OF TABLES

Table 1 Key Caveats
Table 2 Currency Conversion 2013?2018
Table 3 YOY Impact of Market Growth Enablers 2018?2024
Table 4 YOY Impact of Market Growth Restraints on Countries 2018
Table 5 YOY Impact of Market Growth Restraints 2018?2024
Table 6 YOY Impact of Market Growth Restraints on Regions 2018
Table 7 Submarine Fiber Cable Projects
Table 8 YOY Impact of Market Opportunities & Trends 2018?2024
Table 9 YOY Impact of Market Opportunities & Trends on Regions 2018
Table 10 Data Center Construction Market in SEA Overview by Type
Table 11 Qualitative Summary of Data Center Market in Southeast Asia
Table 12 Data Center Construction Market in SEA 2018–2024
Table 13 Data Center Construction Market in SEA by Infrastructure 2018–2024 ($ million)
Table 14 Data Center Electrical Infrastructure Market in SEA 2018–2024 ($ million)
Table 15 Data Center Mechanical Infrastructure Market in SEA 2018–2024 ($ million)
Table 16 Data Center Cooling Systems Market in SEA 2018–2024 ($ million)
Table 17 Data Center Cooling Technique Market in SEA 2018–2024 ($ million)
Table 18 Data Center General Construction Market in SEA 2018–2024 ($ million)
Table 19 Data Center Construction Market in SEA by Tier Standards 2018–2024 ($ million)
Table 20 Data Center Construction Market in Singapore 2018–2024
Table 21 Data Center Infrastructure Market in Singapore 2018–2024 ($ million)
Table 22 Data Center Construction Market in Malaysia 2018–2024
Table 23 Data Center Infrastructure Market in Malaysia 2018–2024 ($ million)
Table 24 Data Center Construction Market in Thailand 2018–2024
Table 25 Data Center Infrastructure Market in Thailand 2018–2024 ($ million)
Table 26 Data Center Construction Market in Indonesia 2018–2024
Table 27 Data Center Infrastructure Market in Indonesia 2018–2024 ($ million)
Table 28 Data Center Construction Market in Other Countries 2018–2024
Table 29 Data Center Infrastructure Market in Other Countries 2018–2024 ($ million)

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