Data Center Market in APAC - Industry Outlook and Forecast 2020-2025

https://marketpublishers.com/r/DE4C7714335AEN.html
Date: February 2020
Pages: 447
Price: US$ 4,250.00 (Single User License)
ID: DE4C7714335AEN

Abstracts

The APAC data center market is expected to grow at a CAGR of over 3% during the period 2019–2025.

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

- 5G Deployment to Increase Edge Data Center Investments
- Renewable Energy to Power Data Centers
- Increased Awareness to Improve Data Center Efficiency
- Growth in Data Center Traffic To aid in 200 GbE and 400 GbE Switch Procurement
- Increase in Submarine Fiber Cable Deployment

The APAC data center market is witnessing steady growth with continued investments from hyperscale and cloud service providers. In 2019, China and Hong Kong led the market in terms of data center development, followed by India, Australia, Japan, and Singapore. Apart from these countries, Indonesia, Thailand, and Malaysia made a sizable contribution toward growth. The implementation of 5G has commenced in several countries, which will have a significant impact on the market with telecommunication providers partnering with service providers in establishing edge data centers throughout the forecast period. The market is also witnessing significant

investments in submarine cable projects from telecommunication service providers, and government entities with hyperscale operates are continuing to invest millions in improving submarine connectivity across regions aiding in the growth.

The introduction of artificial intelligence and machine learning workloads is expected to contribute over 40% in the infrastructure investment in APAC by 2025. Artificial intelligence and machine learning workloads will increase the demand for liquid-immersion and direct-to-chip cooling techniques that can support the density of up to 200 kW. Over 30% of Australian enterprises are involved in the use of AI-based infrastructure solutions as experimental as well as production workloads. The average size of a facility in the APAC region has increased considerably in the last two years. Several operators are involved in land acquisitions for future development, which, in turn, is propelling growth. ODM infrastructure solutions and all-flash storage arrays contribution to the market will continue to grow.

The report considers the present scenario of the APAC data center market during the forecast period and its market dynamics for the forecast period 2020?2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report profiles and examines leading companies and several other prominent companies operating in the market.

APAC Data Center Market: Segmentation

This research report includes detailed segmentation by IT infrastructure, electrical infrastructure, mechanical infrastructure, general construction, tier standards, and geography. With the adoption of IoT, artificial intelligence, and big data analytics, the demand for high-performance computing infrastructure is increasing. The demand for supercomputers is also increasing with the adoption increase in investment towards cryptocurrency mining. Moreover, the increasing development of facilities in China and Hong Kong and the implementation of a high-speed 5G network will boost the data center network market. Over 50% of the business IT budget is spent on the migration to cloud-based services in Australia, with IaaS spending leading the chart followed by SaaS. The Australian market will also witness the increased demand for managed data center services. IT infrastructure spending will be dominated by cloud-service providers.

The increasing adoption of IT infrastructure is a major driver in the data center market in India, with high adoption of servers, storage, and networking infrastructure. Around 70% of startups in India are adopting IoT in their business. Healthcare and manufacturing are popular verticals attracting a lot of investor interests. The IT Infrastructure market in

Japan is gaining traction with the increasing popularity of cloud-based services, IoT, and AI. In Japan, the majority of facilities are having blade types of servers developed for the high-density computing environment. The increasing usage of social media platform in the region will lead to the development of new facilities to store data, which increase the demand for high-capacity storage solutions.

The construction of data centers with power capacity over 20 MW will increase the demand for high-capacity electrical infrastructure. Most facilities support rack power density of 5?10 kW; however, it is expected that new facilities will support a capacity of up to 20 kW during the forecast period. Multiple facilities with a power capacity of more than 10 MW are being implemented in Australia. Data center providers are investing in DRUPS systems with a capacity of around 1,500 kVA. Service providers are featuring lithium-ion batteries, which are likely to increase adoption in the market. The market in India has witnessed the installation of energy-efficient power infrastructure. The contribution of the power infrastructure segment is high because of the growth in the installation of 2N power infrastructure solutions among extensive facilities. The operators are also being prompted to support renewable energy sources to power their IT infrastructure.

Several APAC countries do not support the use of free cooling systems. The operators in this region are still highly dependent on traditional air-based cooling techniques in small facilities that are built as part of commercial complexes. The use of dual water feeds in data centers with on-site water treatment plants is fast gaining popularity in the region as a few countries such as India suffer from acute water shortage for cooling purposes. The increasing demand for ASHRAE and Uptime Institute certified infrastructure is likely to increase the importance of metrics such as power usage effectiveness, water-usage effectiveness, and carbon usage effectiveness during the forecast period. The use of air-based cooling will continue to co-exist in the APAC region because of the growth of small facilities.

China is leading in greenfield construction. There will be more likely to have brownfield developments in Hong Kong due to the space shortage during the forecast period. In terms of physical security, most service providers prefer four layers of safety, with a few engaging in the implementation of five-layer ones due to the increasing demand for colocation services. Australia is witnessing an increase in the construction of greenfield data center projects. Perth, Canberra, Brisbane, and Sydney are some of the major cities in Australia, where greenfield development is likely to increase. The need for DCIM software to monitor facilities will continue to grow as the need to improve operational efficiency is growing. The general construction market will witness an increased construction of data centers in Japan. However, the cost of developing new facilities in the country is high. The rest of the APAC market will witness the entry of new construction services providers with greenfield construction growing. Telecommunication service providers and government agencies are the major investors in Southeast countries.

Multiple facilities are being developed in this region as part of commercial buildings in major cities. This scenario will change in the future years as more standalone data center developments will be witnessed in regions such as Southeast Asia, India, and Rest of APAC during the forecast period. However, with the increase in greenfield development, the need for skilled labor will also grow. The labor shortage is not higher in APAC countries than in European and American regions. Mega data center development will provide a major boost to the revenue growth for local construction contractors and suppliers.

In the APAC region, several under-developed projects fall under the Tier III category. This trend is likely to continue during the forecast period, with many operators expected to move to the Tier IV category based on the growth in rack power density and critical applications. 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 across infrastructures. Most facilities developed were Tier III and Tier IV standards in 2019.

Market Segmentation by IT Infrastructure

Servers

Storage

Network

Market Segmentation by Electrical Infrastructure

UPS Systems

Generators

Transfer Switches and Switchgears

Rack PDU

Other Electrical Infrastructures

Market Segmentation by Mechanical Infrastructure

Cooling Systems

CRAC & CRAH units

Chiller Units

Cooling Towers, Dry Coolers, & Condensers

Other Cooling Units

Racks

Others Mechanical Infrastructure

Market Segmentation by General Construction

Building Development

Installation and Commissioning Services

Building Designs

Physical Security

DCIM & BMS

Market Segmentation by Tier Standards

Tier I &II

Tier III

Tier IV

Insights by Geography

The deployment of data centers in China & Hong Kong is likely to exceed supply due to the increasing demand for cloud-based services, big data analytics, and IoT. China is the world's largest IoT market, with 64% of the 1.5 billion global cellular connections. The market in Hong Kong is witnessing investments YOY, which is aiding the country to emerge as one of the major data center hubs in the world. The submarine cable deployment in Australia will boost facility growth. In 2019, submarine fiber cable projects were INDIGO-Central and INDIGO-West, which connect Australia, Indonesia, and Singapore will contribute to the increase in network traffic.

The data center market in India is one of the fastest-growing in the APAC region. India witnessed continuous investment in cloud adoption and big data analytics from small and medium-sized industries in 2019. Government initiatives such as Digital India are the major contributor to the data center investment growth in the market. The market has also witnessed an increase in the number of new service providers offering hosting, storage, colocation services, and disaster recovery services.

Key Countries

China and Hong Kong

Australia and New Zealand

India

Japan

Rest of Asia

Southeast Asia

Singapore

- Malaysia
- Thailand
- Indonesia
- Other Southeast Asian Countries

Key Vendor Analysis

The APAC data center market is witnessing a steady growth in terms of IT infrastructure procurement, greenfield, brownfield, and modular data center development as well as the high adoption of efficient, scalable, flexible, and reliable infrastructure solutions.

Moreover, the market has a strong presence of vendors in the three categories: IT infrastructure, support infrastructure, and data center investors. From the IT infrastructure perspective, the contribution from APAC based infrastructure providers as well as global providers is almost equal. The increasing competition will prompt vendors to reduce the price of solutions, namely, SSD's and Ethernet Switches to gain major shares. The market is witnessing the growth of data centers that are keen to reduce power and water consumption and decrease carbon dioxide emissions. This will increase the demand for energy-efficient and innovation power and cooling infrastructure solutions. Partnership with facility operators will play a vital role in gaining market share. It is because the majority of the providers in the regions have planned to invest millions of dollars in new facility development.

Key Data Center Critical (IT) Infrastructure Providers

- Hewlett Packard Enterprise (HPE)
- Cisco
- Dell Technologies
- Huawei
- IBM

+44 20 8123 2220
info@marketpublishers.com

Inspur

Key Data Center Support Infrastructure Providers

ABB

Eaton

Rittal

Schneider Electric

STULZ

Vertiv

Caterpillar

Cummins

Key Data Center Contractors

AECOM

Arup

Aurecon

CSF Group

DSCO Group

M+W Group

Nikom Infrasolutions

NTT FACILITIES Group

Key Data Center Investors

- Apple
- AWS (Amazon Web Services)
- GDS Holdings
- Google
- Digital Realty
- Equinix
- NEXTDC
- NTT Communications
- ST TELEMEDIA GLOBAL DATA CENTERS (STT GDC)

Other Prominent Critical (IT) Infrastructure Providers – Arista, Atos, Broadcom, Extreme Network, Hitachi Vantara, Inventec, Juniper, Lenovo, NEC, NetApp, Oracle, Pure Storage, Quanta Cloud Technology (Quanta Computer), Super Micro Computer, and Wistron (Wiwynn)

Other Prominent Support Infrastructure Providers – Airedale Air Conditioning, Alfa Laval, Asetek, Bosch Security Systems (Robert Bosch), Cyber Power Systems, Delta Group, Euro-Diesel (KINOLT), Green Revolution Cooling (GRC), Hitech Power Protection, KOHLER (SDMO), Legrand, Nlyte Software, Mitsubishi, MTU On Site Energy (Rolls-Royce Power Systems AG), Socomec, and Trane (Ingersoll Rand)

Other Prominent Construction Contractors – DPR Construction, Corgan, CSF Group, Cundall, Faithful+Gould, Flex Enclosure, Fortis Construction, Hutchinson Builders, ISG, Larsen & Turbo (L&T), Linesight, LSK Engineering, Nakano Corporation, Obayashi Corporation, and Red-Engineering

+44 20 8123 2220
info@marketpublishers.com

Other Prominent Data Center Investors - Bridge Data Centres, Canberra Data Centres, Chayora, China Unicom, CtrlS, FPT (Frasers Property Thailand), Global Switch, Internet Initiative Japan Inc. (IIJ), Keppel Data Centres, Neo Telemedia, Pi DATACENTERS, Reliance Communications (GLOBAL CLOUD XCHANGE), Sify Technologies, Space DC, Tenglong Holdings Group (Tamron), and Yotta Infrastructure

Key Market Insights Include

The report provides the following insights into the data center market in APAC during the forecast period 2020–2025.

- It offers comprehensive insights into current industry trends, forecast, and growth drivers in the APAC data center market.

- The report provides the latest analysis of share, growth drivers, challenges, and investment opportunities.

- It offers a complete overview of segments and the regional outlook of the APAC data center market.

- The study offers a detailed overview of the vendor landscape, competitive analysis, and key strategies to gain competitive advantage.

Contents

8 MARKET ENABLERS

9 MARKET RESTRAINTS

10 MARKET OPPORTUNITIES & TRENDS

11 MARKET LANDSCAPE

12 FACILITY TYPE

+44 20 8123 2220
info@marketpublishers.com

20 TIER STANDARDS

21 GEOGRAPHY

22 CHINA & HONG KONG

23 AUSTRALIA & NEW ZEALAND

24 INDIA

25 JAPAN

+44 20 8123 2220
info@marketpublishers.com

31 KEY DATA CENTER CONTRACTORS

32 KEY DATA CENTER INVESTORS

+44 20 8123 2220
info@marketpublishers.com

List Of Exhibits

LIST OF EXHIBITS

+44 20 8123 2220
info@marketpublishers.com

million)

+44 20 8123 2220
info@marketpublishers.com

List Of Tables

LIST OF TABLES

+44 20 8123 2220
info@marketpublishers.com

+44 20 8123 2220
info@marketpublishers.com

I would like to order

Product name: Data Center Market in APAC - Industry Outlook and Forecast 2020-2025

Product link: https://marketpublishers.com/r/DE4C7714335AEN.html

Price: US$ 4,250.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page https://marketpublishers.com/r/DE4C7714335AEN.html