

Data Center Market in China and Hong Kong - Industry Outlook and Forecast 2020-2025

<https://marketpublishers.com/r/D5E17DD0BBD8EN.html>

Date: September 2020

Pages: 252

Price: US\$ 3,500.00 (Single User License)

ID: D5E17DD0BBD8EN

Abstracts

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

The China and Hong Kong data center market by revenue is expected to grow at a CAGR of close to 2% during the period 2019–2025.

China and Hong Kong data center market size is expected to reach revenue of close to \$27 billion by 2025, growing at a CAGR close to 2% during the forecast period. The data center market in China & Hong Kong is likely to be driven by the increase in the investment in artificial intelligence, blockchain, and quantum computing. The market for artificial intelligence (AI) is projected to over \$10 billion in 2025. In 2018, AI investments in China were around \$8 billion, which is likely to increase strongly after the recovery of the economy from the COVID-19 pandemic. China is among the leader in blockchain technology. The government announced the creation of Blockchain Network (BCN) across 100 cities, which will add developers to build an application without investing in the blockchain framework. Also, the promotion of blockchain to make a predominant technology for online payments is driving the market. Several organizations and government agencies in China currently use blockchain technology, which is expected to grow significantly over the next few years.

The following factors are likely to contribute to the growth of the China and Hong Kong data center market during the forecast period:

Renewable Energy Procurement to Reduce Electricity Cost

Increasing Adoption of Cloud Services

Implementation of 5G and Smart City Initiatives to Drive Edge Data Center Deployments

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

China and Hong Kong Data Center Market Segmentation

The China and Hong Kong data center market research report includes a detailed segmentation by IT infrastructure, electrical infrastructure, mechanical infrastructure, general construction, tier standards, and geography. The server market in China and Hong Kong is expected to witness significant growth in the next few years due to investments from major cloud service providers. Apple, Alibaba, Tencent, Baidu, and China Telecom are the major cloud service providers/operators investing in the region.

Mega data center projects in China are designed to be of Tier III and Tier IV standards, with the increased deployment of 2N redundant UPS systems. The construction of data centers of over 20 MW power capacity will increase the demand for high-capacity infrastructure over 1 MW. Most facilities support rack power density of 5-10 kW; however, it is expected that new facilities will support a capacity of 20 kW during the forecast period.

In China and Hong Kong, the majority of data center operators are deploying UPS systems in N+N with flexible design supporting up to 2N+1 redundant UPS systems. The increase in the development of hyperscale facilities will increase the UPS installation of over 1 MW capacity. Also, hyperscale operators will be involved in adopting in-rack/in-row UPS systems supporting capacity of less than 100 kVA.

In China, a majority of data centers offer colocation services and adopt air as well as water-based cooling techniques. Some facilities are built to support free cooling techniques. Several service providers use energy-efficient free cooling techniques with redundant units to keep the data center operational. The adoption of CRAC units and chillers will continue to grow to cool the facility in the China data center market.

China is a leader in greenfield data center construction. Hyperscale developments are to increase the demand for engineering services in China. The construction cost of facilities can range from \$50 to \$80 per square, which is lower than Hong Kong, which is around \$200 per square feet. In terms of physical security, most service providers prefer four layers of safety, with a few engaged in the implementation of five-layer ones due to the increasing demand for colocation services. CCTV surveillance, access control, anti-tailing doors, metal detectors, and X-ray machines are the major security measures installed in data centers. Hong Kong is likely to have high brownfield deployments due to the space shortage. Innovations in connected security products are providing a boost for market growth. Data center operators prefer the analytics of video surveillance recording. Modern facilities are also protected from EMP and lightning during natural disasters. In the coming years, the market will witness the increased use of robot monitoring systems in the facility, with sensor and video surveillance.

Most new data centers are designed to be of Tier III standards with a minimum of N+1 redundancy and can be reconfigured with up to 2N+1 redundancy as the need arises, with the incorporation of flexible designs. Tier IV facilities 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. These facilities generate more revenue for the market, with focused investment on highly efficient cooling systems. A majority of facilities developed in China and Hong Kong follow the Uptime Institute guidelines in design, construction, and operational sustainability. Expertise in designing and building facilities based on the guideline's providers by the above-mentioned regulatory body would be beneficial for local contractors.

Segmentation by IT Infrastructure

Server Infrastructure

Storage Infrastructure

Network Infrastructure

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

Economizers & Evaporative Coolers

Other Units

Racks

Other Mechanical Infrastructure

Segmentation by General Construction

Building Development

Installation & Commissioning Services

Building Designs

Physical Security

DCIM/BMS

Segmentation by Tier Standard

Tier I & Tier II

Tier III

Tier IV

INSIGHTS BY GEOGRAPHY

China is the prominent market for data center operations in the APAC region. The continuous booming of internet users, the growth in gaming and e-commerce industries, and investments in the digitalization of enterprises increase the demand for data centers. Tier I cities such as Beijing, Shanghai, Shenzhen, and Guangzhou are the major data center markets in the country. In China, the investment is led by internet, cloud, colocation, and telecommunication service providers such as Alibaba, China Unicom, Shanghai Athub, ChinData, Qnet, China Telecom, Chayora, GDS Services, ChinaCache, Dr.Peng Group, Wangsu Technology, Tencent, Sinnet Technology, 21Vianet, and China Mobile. The data center market in China is increasing YOY aided by the strong growth in the advantage of technological adoption across the country and the increase in the number of submarine cable deployments connecting China. There is a high demand for cryptocurrency and blockchain data centers in China, boosting the development of facilities with high-performance computing infrastructure.

Segmentation by Geography

China

Hong Kong

INSIGHTS BY VENDORS

The data center construction market in China and Hong Kong is continuing to grow in terms of greenfield and brownfield facility construction. The market is still witnessing increased growth in the number of data centers, with high adoption of efficient and modular infrastructure solutions. The market has a strong presence of vendors across all three categories, such as electrical infrastructure, mechanical infrastructure, and

general construction.

Prominent IT Infrastructure Vendors

HPE (H3C)

Cisco

Dell Technologies

Hitachi Vantara

Huawei

IBM

Inspur Group

Lenovo

Quanta Cloud Technology (Quanta Computer)

Prominent Construction Contractors

Arup Group

Aurecon Construction

AWP Architects

BYME Engineering

Chung Hing Engineers Group

DSCO Group

Faithful+Gould

Gammon Construction

ISG

Studio One Design Limited

NTT FACILITIES

Prominent Support Infrastructure Providers

ABB

Vertiv

Caterpillar

Cummins

Delta Group

Eaton

Schneider Electric

Fuji Electric

Hitec Power Protection

Mitsubishi Electric

Legrand Group

Rittal

MTU On Site Energy

AIRSYS

Kstar New Energy

Prominent Data Center Investors

Apple

Chayora Holdings

China Unicom

ChinData Group

Equinix

GDS Holdings

Global Switch

PT Telekomunikasi Group

Shanghai Athub

Shanghai Qnet Network Technology

SUNeVison

Tencent Holdings

Tenglong Holdings Group (Tamron)

KEY QUESTIONS ANSWERED

1. What is the China and Hong Kong data center market size and growth rate during the forecast period?
2. What are the factors impacting the growth of China and Hong Kong data center market share?
3. What are the drivers, trends, and restraints in the China and Hong Kong data center

market?

4. Who are the leading infrastructure vendors, construction contractors and data center investors in the China and Hong Kong data center market?

5. What is the impact of the COVID-19 pandemic on the China and Hong Kong data center market?

Contents

1 RESEARCH METHODOLOGY

2 RESEARCH OBJECTIVES

3 RESEARCH PROCESS

4 SCOPE & COVERAGE

4.1 Market Definition

4.2 Base Year

4.3 Scope of The Study

4.4 Market Segments

4.4.1 Market Segmentation by Infrastructure

4.4.2 Market Segmentation by IT Infrastructure

4.4.3 Market Segmentation by Electrical Infrastructure

4.4.4 Market Segmentation by Mechanical Infrastructure

4.4.5 Market Segmentation by Cooling Systems

4.4.6 Market Segmentation by General Construction

4.4.7 Market Segmentation by Tier Standards

4.4.8 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 Internet Penetration

7.1.1 Impact Of Internet Penetration In China & Hong Kong

7.2 Submarine Cables

7.2.1 Impact Of Submarine Cables On China & Hong Kong Data Center Market

8 COVID-19 IMPACT

8.1 Impact Of Covid-19 On Data Center Market

- 8.1.1 Construction Perspective
- 8.1.2 Infrastructure Production & Procurement
- 8.1.3 Data Center Operations

8.2 Impact Of Covid-19 On China & Hong Kong Data Center Market

9 MARKET GROWTH ENABLERS

- 9.1 Digitalization Drives Data Center Investments
- 9.2 Growing Demand For Colocation & Hyperscale Data Centers
- 9.3 Increased Adoption Of Cloud Services
- 9.4 Big Data & IoT Spending To Drive Data Center Investment

10 MARKET RESTRAINTS

- 10.1 Ease Of Doing Business
- 10.2 Scarcity Of Land In Hong Kong Impacts Data Center Growth
- 10.3 Air Pollution Restricts Free Cooling

11 MARKET OPPORTUNITIES & TRENDS

- 11.1 Increase In Renewable Energy Procurement
- 11.2 Rising Investment In AI, Blockchain Technology & Quantum Computing
- 11.3 Implementation Of 5G & Smart City Initiatives To Drive Edge Data Centers

12 MARKET LANDSCAPE

- 12.1 Market Overview
- 12.2 Market Size & Forecast
- 12.3 Five Forces Analysis
 - 12.3.1 Threat Of New Entrants
 - 12.3.2 Bargaining Power Of Suppliers
 - 12.3.3 Bargaining Power Of Buyers
 - 12.3.4 Threat Of Substitutes
 - 12.3.5 Competitive Rivalry

13 INFRASTRUCTURE

13.1 Market Snapshot & Growth Engine

13.2 Market Overview

13.3 IT Infrastructure

13.3.1 Market Overview

13.3.2 Market Size & Forecast

13.4 Electrical Infrastructure

13.4.1 Market Overview

13.4.2 Market Size & Forecast

13.5 Mechanical Infrastructure

13.5.1 Market Overview

13.5.2 Market Size & Forecast

13.6 General Construction

13.6.1 Market Overview

13.6.2 Market Size & Forecast

14 IT INFRASTRUCTURE

14.1 Market Snapshot & Growth Engine

14.3 Server

14.3.1 Market Overview

14.3.2 Market Size & Forecast

14.4 Storage

14.4.1 Market Overview

14.4.2 Market Size & Forecast

14.5 Network

14.5.1 Market Overview

14.5.2 Market Size & Forecast

15 ELECTRICAL INFRASTRUCTURE

15.1 Market Snapshot & Growth Engine

15.2 Ups Systems

15.2.1 Market Overview

15.2.2 Market Size & Forecast

15.3 Generators

15.3.1 Market Overview

15.3.2 Market Size & Forecast

15.4 Transfer Switches & Switchgear

15.4.1 Market Overview

- 15.4.2 Market Size & Forecast
- 15.5 PDU
 - 15.5.1 Market Overview
 - 15.5.2 Market Size & Forecast
- 15.6 Other Electrical Infrastructure
 - 15.6.1 Market Overview
 - 15.6.2 Market Size & Forecast

16 MECHANICAL INFRASTRUCTURE

- 16.1 Market Snapshot & Growth Engine
- 16.2 Cooling Systems
 - 16.2.1 Market Overview
 - 16.2.2 Market Size & Forecast
- 16.3 Racks
 - 16.3.1 Market Overview
 - 16.3.2 Market Size & Forecast
- 16.4 Other Mechanical Infrastructure
 - 16.4.1 Market Overview
 - 16.4.2 Market Size & Forecast

17 COOLING SYSTEMS

- 17.1 Market Snapshot & Growth Engine
- 17.2 CRAC & CRAH Units
 - 17.2.1 Market Overview
 - 17.2.2 Market Size & Forecast
- 17.3 Chiller Units
 - 17.3.1 Market Overview
 - 17.3.2 Market Size & Forecast
- 17.4 Cooling Towers, Dry Coolers, & Condensers
 - 17.4.1 Market Overview
 - 17.4.2 Market Size & Forecast
- 17.5 Economizers & Evaporative Coolers
 - 17.5.1 Market Overview
 - 17.5.2 Market Size & Forecast
- 17.6 Other Cooling Units
 - 17.6.1 Market Overview
 - 17.6.2 Market Size & Forecast

18 COOLING TECHNIQUES

18.1 Market Snapshot & Growth Engine

18.2 Air-Based Cooling Techniques

18.2.1 Market Overview

18.2.2 Market Size & Forecast

18.3 Liquid-Based Cooling Techniques

18.3.1 Market Overview

18.3.2 Market Size & Forecast

19 GENERAL CONSTRUCTION

19.1 Market Snapshot & Growth Engine

19.2 Building Development

19.2.1 Market Overview

19.2.2 Market Size & Forecast

19.3 Installation & Commissioning Services

19.3.1 Market Overview

19.3.2 Market Size & Forecast

19.4 Building Design

19.4.1 Market Overview

19.4.2 Market Size & Forecast

19.5 Physical Security

19.5.1 Market Overview

19.5.2 Market Size & Forecast

19.6 DCIM/BMS

19.6.1 Market Overview

19.6.2 Market Size & Forecast

20 TIER STANDARDS

20.1 Market Snapshot & Growth Engine

20.2 Overview Of Tier Standards

20.3 Tier I & Tier II

20.3.1 Market Overview

20.3.2 Market Size & Forecast

20.4 Tier III

20.4.1 Market Overview

- 20.4.2 Market Size & Forecast
- 20.5 Tier IV
 - 20.5.1 Market Overview
 - 20.5.2 Market Size & Forecast

21 GEOGRAPHY

- 21.1 Geography Snapshot & Growth Engine
- 21.2 Geography Snapshot & Growth Engine
- 21.3 Geography Snapshot & Growth Engine

22 CHINA

- 22.1 Market Snapshot & Growth Engine
- 22.2 Market Overview
- 22.3 Investment: Market Size & Forecast
- 22.4 Area: Market Size & Forecast
- 22.5 Power Capacity: Market Size & Forecast
- 22.6 Market By Infrastructure
 - 22.6.1 Electrical Infrastructure: Market Size & Forecast
 - 22.6.2 Mechanical Infrastructure: Market Size & Forecast
 - 22.6.3 General Construction: Market Size & Forecast

23 HONG KONG

- 23.1 Market Snapshot & Growth Engine
- 23.2 Market Overview
- 23.3 Investment: Market Size & Forecast
- 23.4 Area: Market Size & Forecast
- 23.5 Power Capacity: Market Size & Forecast
- 23.6 Market By Infrastructure
 - 23.6.1 Electrical Infrastructure: Market Size & Forecast
 - 23.6.2 Mechanical Infrastructure: Market Size & Forecast
 - 23.6.3 General Construction: Market Size & Forecast

24 KEY MARKET PARTICIPANTS

- 24.1 Competitive Scenario
- 24.2 Infrastructure Providers

24.3 Construction Contractors

24.4 Data Center Investors

25 PROMINENT IT INFRASTRUCTURE PROVIDERS

25.1 Hewlett Packard Enterprise (HPE)

25.1.1 Business Overview

25.1.2 Product Offerings

25.1.3 Key News

25.2 Cisco

25.2.1 Business Overview

25.2.2 Product Offerings

25.2.3 Key News

25.3 Dell Technologies

25.3.1 Business Overview

25.3.2 Product Offerings

25.3.3 Key News

25.4 Hitachi Vantara

25.4.1 Business Overview

25.4.2 Product Offerings

25.5 Huawei

25.5.1 Business Overview

25.5.2 Product Offerings

25.5.3 Key News

25.6 IBM

25.6.1 Business Overview

25.6.2 Product Offerings

25.6.3 Key News

25.7 Inspur

25.7.1 Business Overview

25.7.2 Product Offerings

25.7.3 Key News

25.8 Lenovo

25.8.1 Business Overview

25.8.2 Product Offerings

25.9 Quanta Cloud Technology (Quanta Computer)

25.9.1 Business Overview

25.9.2 Product Offerings

26 PROMINENT CONSTRUCTION CONTRACTORS

26.1 Arup

26.1.1 Business Overview

26.1.2 Service Offerings

26.2 Aurecon

26.2.1 Business Overview

26.2.2 Service Offerings

26.3 AWP Architects

26.3.1 Business Overview

26.3.2 Service Offerings

26.4 Byrne Engineering Limited

26.4.1 Business Overview

26.4.2 Service Offerings

26.5 Chung Hing Engineers Group

26.5.1 Business Overview

26.5.2 Service Offerings

26.6 Dsco Group

26.6.1 Business Overview

26.6.2 Service Offerings

26.7 Faithful+Gould

26.7.1 Business Overview

26.7.2 Service Offerings

26.8 Gammon Construction

26.8.1 Business Overview

26.8.2 Service Offerings

26.9 ISG

26.9.1 Business Overview

26.9.2 Service Offerings

26.10 Studio One Design Limited

26.10.1 Business Overview

26.10.2 Service Offerings

26.11 NTT Facilities Group

26.11.1 Business Overview

26.11.2 Service Offerings

27 PROMINENT SUPPORT INFRASTRUCTURE PROVIDERS

27.1 ABB

- 27.1.1 Business Overview
- 27.1.2 Product Offerings
- 27.2 Vertiv
 - 27.2.1 Business Overview
 - 27.2.2 Product Offerings
- 27.3 Caterpillar
 - 27.3.1 Business Overview
 - 27.3.2 Product Offerings
- 27.4 Cummins
 - 27.4.1 Business Overview
 - 27.4.2 Product Offerings
- 27.5 Delta Group
 - 27.5.1 Business Overview
 - 27.5.2 Product Offerings
- 27.6 Eaton
 - 27.6.1 Business Overview
 - 27.6.2 Product Offerings
- 27.7 Schneider Electric
 - 27.7.1 Business Overview
 - 27.7.2 Product Offerings
- 27.8 Fuji Electric
 - 27.8.1 Business Overview
 - 27.8.2 Product Offerings
- 27.9 Hitec Power Protection
 - 27.9.1 Business Overview
 - 27.9.2 Product Offerings
- 27.10 Mitsubishi Electric
 - 27.10.1 Business Overview
 - 27.10.2 Product Offerings
- 27.11 Legrand Group
 - 27.11.1 Business Overview
 - 27.11.2 Product Offerings
- 27.12 Rittal
 - 27.12.1 Business Overview
 - 27.12.2 Product Offerings
- 27.13 Mtu On Site Energy (Rolls-Royce Power Systems Ag)
 - 27.13.1 Business Overview
 - 27.13.2 Product Offerings
- 27.14 Airsys

- 27.14.1 Business Overview
- 27.14.2 Product Offerings
- 27.15 Kstar
 - 27.15.1 Business Overview
 - 27.15.2 Product Offerings

28 PROMINENT DATA CENTER INVESTORS

- 28.1 Apple
 - 28.1.1 Business Overview
 - 28.1.2 Service Offerings
- 28.2 Aws (Amazon Web Services)
 - 28.2.1 Business Overview
 - 28.2.2 Service Offerings
- 28.3 China Unicom
 - 28.3.1 Business Overview
 - 28.3.2 Service Offerings
 - 28.3.3 Key News
- 28.4 Chayora Holdings Limited
 - 28.4.1 Business Overview
 - 28.4.2 Service Offerings
 - 28.4.3 Key News
- 28.5 Chindata
 - 28.5.1 Business Overview
 - 28.5.2 Service Offerings
- 28.6 Equinix
 - 28.6.1 Business overview
 - 28.6.2 Service Offerings
 - 28.6.3 Key News
- 28.7 GDS Holdings
 - 28.7.1 Business Overview
 - 28.7.2 Service Offerings
 - 28.7.3 Key News
- 28.8 Global Switch
 - 28.8.1 Business Overview
 - 28.8.2 Service Offerings
 - 28.8.3 Key News
- 28.9 Pt Telekomunikasi Indonesia
 - 28.9.1 Business Overview

- 28.9.2 Service Offerings
- 28.10 Sunevision (Iadvantage)
 - 28.10.1 Business Overview
 - 28.10.2 Service Offerings
- 28.11 Shanghai Athub
 - 28.11.1 Business Overview
 - 28.11.2 Service Offerings
- 28.12 Shanghai Qnet Networking Technology
 - 28.12.1 Business Overview
 - 28.12.2 Service Offerings
- 28.13 Tencent Holdings Limited
 - 28.13.1 Business Overview
 - 28.13.2 Service Offerings
- 28.14 Tenglong Holdings Group (Tamron)
 - 28.14.1 Business Overview
 - 28.14.2 Service Offerings
 - 28.14.3 Key News

29 REPORT SUMMARY

- 29.1 Key Takeaways

30 QUANTITATIVE SUMMARY

- 30.1.1 Overall market
- 30.1.2 Market by Infrastructure
- 30.1.3 Market by IT Infrastructure
- 30.1.4 Market by Electrical Infrastructure
- 30.1.5 Market by Mechanical Infrastructure
- 30.1.6 Market by Cooling Systems
- 30.1.7 Market by Cooling Technique
- 30.1.8 Market by General Construction
- 30.1.9 Market by Tier Standards
- 30.2 Geographical Segmentation
 - 30.2.1 Investment by Countries
 - 30.2.2 Investment by Area
 - 30.2.3 Investment by Power Capacity
- 30.3 China
 - 30.3.1 Overall Market

- 30.3.2 Market By Infrastructure
- 30.4 Hong Kong
 - 30.4.1 Overall Market
 - 30.4.2 Market By Infrastructure

31 APPENDIX

- 31.1 Abbreviations

List Of Exhibits

LIST OF EXHIBITS

- Exhibit 1 Segmentation of Data Center Market in China & Hong Kong
- Exhibit 2 Market Size Calculation Approach 2019
- Exhibit 3 Internet Penetration Statistics in China & Hong Kong in 2019 (%)
- Exhibit 4 Impact of Digitalization Drives Data Center Investments
- Exhibit 5 Impact of Growing Demand for Colocation & Hyperscale Data Centers
- Exhibit 6 Impact of Increased Adoption of Cloud Services
- Exhibit 7 Impact of Big Data & IoT Spending to Drive Data Center Investment
- Exhibit 8 Impact of Ease of Doing Business
- Exhibit 9 Impact of Scarcity of Land in Hong Kong Impacts Data Center Growth
- Exhibit 10 Impact of Air Pollution Restricts Free Cooling
- Exhibit 11 Impact of Renewable Energy to Reduce Power Cost
- Exhibit 12 Impact of Rising Investment in AI, Blockchain & Quantum Computing
- Exhibit 13 Impact of Implementation of 5G & Smart City Initiatives to Drive Edge Data Centers
- Exhibit 14 Data Center Market in CHK (Including IT Infrastructure) 2019–2025 (\$ billion)
- Exhibit 15 Data Center Market in CHK by Support Infrastructure 2019–2025 (\$ million)
- Exhibit 16 Data Center Market in CHK by Area 2019–2025 (Million Square Feet)
- Exhibit 17 Data Center Market in CHK by Power Capacity 2019–2025 (MW)
- Exhibit 18 Five Forces Analysis 2019
- Exhibit 19 Incremental Growth by Infrastructure 2019?2025
- Exhibit 20 Data Center Market in China & Hong Kong by Infrastructure
- Exhibit 21 Data Center Market in CHK by IT Infrastructure 2019–2025 (\$ billion)
- Exhibit 22 Data Center Electrical Infrastructure Market in CHK 2019–2025 (\$ million)
- Exhibit 23 Data Center Mechanical Infrastructure Market in CHK 2019?2025 (\$ million)
- Exhibit 24 Data Center General Construction Market in CHK 2019?2025 (\$ million)
- Exhibit 25 Incremental Growth by IT Infrastructure 2019?2025
- Exhibit 26 Data Center Server Market in CHK 2019?2025 (\$ billion)
- Exhibit 27 Data Center Storage Market in CHK 2019?2025 (\$ billion)
- Exhibit 28 Data Center Networking Market in CHK 2019?2025 (\$ billion)
- Exhibit 29 Incremental Growth by Electrical Infrastructure 2019?2025
- Exhibit 30 Data Center UPS Market in CHK 2019?2025 (\$ million)
- Exhibit 31 Data Center Generator Market in CHK 2019?2025 (\$ million)
- Exhibit 32 Data Center Transfer Switches & Switchgears Market in CHK 2019?2025 (\$ million)
- Exhibit 33 Data Center PDU Market in CHK 2019?2025 (\$ million)

Exhibit 34 Data Center Other Electrical Infrastructure Market in CHK 2019?2025 (\$ million)

Exhibit 35 Incremental Growth by Mechanical Infrastructure 2019?2025

Exhibit 36 Data Center Cooling Systems Market in CHK 2019?2025 (\$ million)

Exhibit 37 Data Center Rack Market in CHK 2019?2025 (\$ million)

Exhibit 38 Data Center Other Mechanical Infrastructure Market in CHK 2019?2025 (\$ million)

Exhibit 39 Incremental Growth by Cooling Systems 2019?2025

Exhibit 40 Data Center CRAC & CRAH Market in CHK 2019?2025 (\$ million)

Exhibit 41 Data Center Chiller Units Market in CHK 2019?2025 (\$ million)

Exhibit 42 Data Center Cooling Towers & Dry Coolers Market in CHK 2019?2025 (\$ million)

Exhibit 43 Data Center Economizers & Evaporative Coolers Market in CHK 2019?2025 (\$ million)

Exhibit 44 Data Center Other Cooling Units Market in CHK 2019?2025 (\$ million)

Exhibit 45 Incremental Growth by Cooling Techniques 2019?2025

Exhibit 46 Data Center Air-based Cooling Techniques Market in CHK 2019?2025 (\$ million)

Exhibit 47 Data Center Liquid-based Cooling Techniques Market in CHK 2019?2025 (\$ million)

Exhibit 48 Incremental Growth by General Construction 2019?2025

Exhibit 49 Data Center Building Development Market in CHK 2019?2025 (\$ million)

Exhibit 50 Data Center Installation & Commissioning Services Market in CHK 2019?2025

Exhibit 51 Data Center Building Design Market in CHK 2019?2025 (\$ million)

Exhibit 52 Data Center Physical Security Market in CHK 2019?2025 (\$ million)

Exhibit 53 Data Center DCIM Market in CHK 2019?2025 (\$ million)

Exhibit 54 Incremental Growth by Tier Standards 2019?2025

Exhibit 55 Tier I & II Data Center Market in CHK 2019–2025 (\$ million)

Exhibit 56 Tier III Data Center Market in CHK 2019–2025 (\$ million)

Exhibit 57 Tier IV Data Center Market in CHK 2019–2025 (\$ million)

Exhibit 58 Incremental Growth by Geography 2019?2025 (\$ million)

Exhibit 59 Incremental Growth by Geography 2019?2025 (MW)

Exhibit 60 Incremental Growth by Geography 2019?2025 (Million Square feet)

Exhibit 61 Snapshot ? Data Center Market in China 2019?2025

Exhibit 62 Data Center Market in China by Investment 2019–2025 (\$ million)

Exhibit 63 Data Center Market in China by Area 2019–2025 (Million Square Feet)

Exhibit 64 Data Center Market in China by Power Capacity 2019–2025 (MW)

Exhibit 65 Data Center Electrical Infrastructure Market in China 2019–2025 (\$ million)

Exhibit 66 Data Center Mechanical Infrastructure Market in China 2019–2025 (\$ million)

Exhibit 67 Data Center General Construction Market in China 2019–2025 (\$ million)

Exhibit 68 Snapshot ? Data Center Market in Hong Kong 2019?2025

Exhibit 69 Data Center Market in Hong Kong by Investment 2019–2025 (\$ million)

Exhibit 70 Data Center Market in Hong Kong by Area 2019–2025 (Million Square Feet)

Exhibit 71 Data Center Market in Hong Kong by Power Capacity 2019–2025 (MW)

Exhibit 72 Data Center Electrical Infrastructure Market in Hong Kong 2019–2025 (\$ million)

Exhibit 73 Data Center Mechanical Infrastructure Market in Hong Kong 2019–2025 (\$ million)

Exhibit 74 Data Center General Construction Market in Hong Kong 2019–2025 (\$ million)

Exhibit 75 Data Center IT Infrastructure Market in HK 2019?2025 (\$ billion)

List Of Tables

LIST OF TABLES

Table 1 Key Caveats

Table 2 Currency Conversion 2013?2019

Table 3 LIST OF Submarine Fiber Cable Projects

Table 4 Impact of COVID-19 Pandemic on China & Hong Kong Data Center Market

Table 5 HPE: Key Product Offerings

Table 6 Cisco: Key Product Offerings

Table 7 Dell: Key Product Offerings

Table 8 Huawei: Key Product Offerings

Table 9 IBM: Key Product Offerings

Table 10 INSPUR: Key Product Offerings

Table 11 Data Center Market in CHK (Including IT Infrastructure) 2019?2025

Table 12 Data Center Infrastructure Market in CHK (Including IT Infrastructure)
2019?2025 (\$ million)

Table 13 Data Center Electrical Infrastructure Market in CHK 2019?2025 (\$ million)

Table 14 Data Center Mechanical Infrastructure Market in CHK 2019?2025 (\$ million)

Table 15 Data Center Cooling Systems Market in CHK 2019?2025 (\$million)

Table 16 Data Center Cooling Technique Market in CHK 2019?2025 (\$million)

Table 17 Data Center General Construction Market in CHK 2019?2025 (\$million)

Table 18 Data Center Market in CHK by TIER Standard 2019?2025 (\$million)

Table 19 Data Center Market in CHK by Investment 2019?2025 (\$ million)

Table 20 Data Center Market in CHK by Area 2019?2025 (million square feet)

Table 21 Data Center Market in CHK by Power Capacity 2019?2025 (MW)

Table 22 Data Center Market in China 2019?2025

Table 23 Data Center Infrastructure Market in China 2019?2025 (\$million)

Table 24 Data Center Market in Hong Kong 2019?2025

Table 25 Data Center Infrastructure Market in Hong Kong 2019?2025 (\$ million)

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