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 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 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

PDUs

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

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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

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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?

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