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Data Center Market in Southeast Asia - Industry Outlook and Forecast 2021-2026

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Abstracts

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

The Southeast Asia data center market by investment is expected to grow at a CAGR of over 8% during the period 2021–2026.

The data center market in Southeast Asia is growing significantly, with multiple investments in Singapore, Indonesia, Malaysia, Vietnam, Cambodia, and Thailand. Southeast Asia is among the fastest-growing digital markets worldwide. The internet usage and social media trends have increased the demand for faster internet networks and data centers to store data generated by them. The internet penetration is one of the strongest drivers for the data center market in Southeast Asia. Moreover, social media usage among consumers and digital transformation by enterprises across industry verticals are other major factors promoting data center growth. The investments are growing significantly across Singapore, Indonesia, Malaysia, Vietnam, Cambodia, and Thailand. In 2020, Equinix, Digital Realty, NTT Global Data Centers, Space DC & GIC, ST Telemedia Global Data Centres, DTP, and DCI Indonesia were major investors in the Southeast Asia data center market.

The following factors are likely to contribute to the growth of the Southeast Asia data center market during the forecast period:

- Increasing Adoption of Renewable Energy
- Implementation of Advanced Technology in Data Centers

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Replacement of VRLA with Lithium-Ion Batteries

Increased Adoption of All-Flash & Hybrid Array

The study considers the present scenario of the Southeast Asia data center market and its market dynamics for the period 2020?2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Southeast Asia Data Center Market Segmentation

The Southeast Asia Data center market research report includes a detailed segmentation by IT infrastructure, electrical infrastructure, mechanical infrastructure, cooling technique, cooling systems, general construction, tier standards, geography. The server market expects to witness significant growth in the next few years due to increased investments from large cloud service providers in the region. The adoption of converged and hyper-converged infrastructure solutions is projected to increase the demand for servers with multicore processors. The migration of enterprises from on-premises to colocation facilities is likely to aid in the growth of high-performance computing (HPC) infrastructure in the Southeast Asia market.

The data center generator market is likely to grow due to the construction of large and mega facilities across the Southeast Asia region. The adoption of efficient power systems such as gas generators is growing. The implementation of the carbon tax in countries such as Singapore has driven operators to opt for efficient generators. Although generators are the significant sources of carbon emission, their adoption among facilities continues to grow. However, operators are adopting efficient and cleaner power sources. Innovations in terms of fuel cells are expected to reduce the use of generators during the forecast period.

Most data centers in Singapore design to cool infrastructure through water-based cooling techniques. The use of air-based cooling is low in Singapore than in other Southeast Asian countries. Data centers are designed for hot/cold aisle containment systems and are equipped with 42U and 45U racks. However, 47U–48U racks expect to witness high growth during the forecast period. In Malaysia, both air-based and water-based cooling systems use for cooling purposes. Large facilities in the country expect to use water-based cooling solutions, whereas small ones are likely to use air-based

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cooling systems. Similarly, several small data centers in Thailand implement air-based cooling systems.

The majority of data center development in Malaysia is greenfield construction. The market has strong growth potential for modular projects. The labor cost in Malaysia is cheaper than in Singapore. However, the non-availability of a skilled workforce is a significant challenge among service providers operating in the country. Several facilities in Singapore install DCIM, BMS, and EMS systems for physical security, monitoring, and management. The data center market in Thailand includes greenfield and brownfield data center construction. It requires trained data center professionals to overcome the shortage of skilled workforce in the country. Infrastructure providers and their local partners also serve as a strong backbone for installation and commissioning services.

The Tier III data center market in Southeast Asia expects to reach USD 1.3 billion in 2026, growing at a CAGR of over 8%. There are over 89 tier III certified facilities in seven countries, including Singapore, Indonesia, Malaysia, and Thailand. Indonesia is the major location with around 40 certified facilities. Most new data centers in the region are designed according to Tier III standards with a minimum of N+1 redundancy. The Tier IV data center market is expected to reach over USD 620 million by 2026. Singapore, Indonesia, Thailand, and Myanmar are witnessing Tier IV facilities' construction, with Indonesia and Thailand accounting for seven Tier IV facilities. Facebook, Apple, Microsoft, and Google are the major contributors to the Tier IV market.

By IT Infrastructure

- Servers
- Storage
- Network

By Electrical Infrastructure

- UPS Systems
- Generators

Transfer Switches and Switchgears

PDUs

Other Electrical Infrastructures

By Mechanical Infrastructure

Cooling Systems

CRAC & CRAH Units

Chiller Units

Cooling Towers, Dry Coolers, & Condensers

Other Cooling Units

Racks

Others Mechanical Infrastructure

By Cooling Technique

Air-based Cooling Technique

Liquid-based Cooling Technique

By General Construction

Core and Shell Development

Installation and Commissioning Services

Engineering and Building Designs

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Physical Security

DCIM/BMS

By Tier Standards

Tier I & II

Tier III

Tier IV

INSIGHTS BY GEOGRAPHY

Singapore is the major data center hub in Southeast Asia, with the presence of several facilities operated by internet, cloud, telecommunication, and colocation service providers. The sub-sea fiber network connectivity routes over 90% of the world's Internet traffic. Singapore has robust fiber connectivity to major APAC data center market and continues to expand its capacity. Many cloud service providers support customers in APAC via Singapore. The Singapore government is likely to migrate government systems to the cloud. In December 2020, Equinix announced the development of its fifth data center facility in Singapore (SG5), which expects to be operational by Q2 2021. The impact of the COVID-19 pandemic on the Singapore data center market was low as these services were termed as essential. Singapore is observing investment in renewable energy such as solar and wind sources which are led by hyperscale and colocation data center operators such as Microsoft, Facebook, and Equinix. Renewable energy installations will continue to grow among existing and upcoming facilities across the country.

By Geography

Southeast Asia

Singapore

Malaysia

- Thailand
- Indonesia
- Cambodia & Myanmar
- Vietnam
- Philippines

INSIGHTS BY VENDORS

HPE, Dell Technologies, Fujitsu, NetApp, Inspur, Oracle Huawei, NetApp, and Cisco Systems are among the major revenue contributors in the Southeast Asia data center market share. AWS, Microsoft, Alibaba, Tencent, IBM, Oracle, and Google are expanding their new cloud regions. These providers are the major adopters of high-density, mission-critical servers, storage infrastructure, and network infrastructure. Schneider Electric, Eaton, Cummins, Vertiv, Rolls Royce Power Systems, HITEC Power Protection Caterpillar, and ABB are the major electrical infrastructure vendors with a strong presence in Southeast Asia. The infrastructure market in Southeast Asia will witness immense competition with the growing construction of data centers in the next few years.

Key Data Center Critical (IT) Infrastructure Providers

- Arista Networks
- Broadcom
- Cisco Systems
- Dell Technologies
- Fujitsu
- Hewlett Packard Enterprise (HPE)

Huawei Technologies

IBM

Inspur

Lenovo

NetApp

Oracle

Key Data Center Support Infrastructure Providers

ABB

Bosch Security Systems (Robert Bosch)

Caterpillar

Cummins

Cyber Power Systems

Delta Electronics

Eaton

Fuji Electric

HITEC Power Protection

KOHLER-SDMO

Legrand

Mitsubishi Electric Corporation

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Piller Power Systems

Rittal

Rolls-Royce Power Systems

Schneider Electric

Vertiv Group

Key Data Center Contractors

Arup Group

AWP Architects

Aurecon Group

CSF Group

Cundall

DSCO Group

Fortis Construction

Faithful+Gould

Kienta Engineering Construction

LSK Engineering

M+W Group (Exyte)

NTT FACILITIES Group

Nakano Corporation

PM Group

Sato Kogyo

Key Data Center Investors

AIMS Data Centre

AirTrunk Operating

Bridge Data Centres

BDx (Big Data Exchange)

Digital Realty

DCI Indonesia

DTP

Equinix

Iron Mountain

Keppel Data Centres

Kepstar Data Centre Management

NTT Global Data Centers

Regal Orion

Space DC

ST Telemedia Global Data Centres

VADS Berhad

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KEY QUESTIONS ANSWERED

1. How big is the Southeast Asia data center market size?
2. What is the number of Tier III data centers in Southeast Asia?
3. What is the total number of data centers in Southeast Asia?
4. Which cooling systems are likely to generate the largest revenue in the Southeast Asia data center market during the forecast period?
5. Who are the key investors in the Southeast Asia data center market?
6. What are the key factors driving the growth of the Southeast Asia data center market?

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