

Hong Kong Data Center Market - Investment Analysis and Growth Opportunities 2021-2026

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Abstracts

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

The Hong Kong Data Center Market Size Will Witness Investments Of USD 4 Billion By 2026, Growing At a CAGR Of 2% During 2021-2026

Hong Kong is one of the most advanced data center markets in the APAC market. It includes several unique third-party data center service providers operating data center facilities. In addition, the country includes several on-premises/dedicated data centers owned by local enterprises. It is witnessing investments in about 6 facilities, which are expected to be operational in the next 2–3 years. COVID-19 has been a strong enabler for further digitization in the country. A stable economy, high-capacity fiber connectivity with the rest of the world, and the increasing local demand for digitalization of business and consumer environments are driving the growth of the Hong Kong data center market.

The report considers the present scenario of the Hong Kong data center market and its market dynamics for the forecast period 2021-2026. It covers a detailed overview of several growth enablers, restraints, and trends in the market. The study includes the demand and supply aspects of the market.

Key Highlights Of The Report:

According to Cushman and Wakefield, Hong Kong accounted for 54% of the APAC data center investment in the first half of 2020.

The adoption of advanced technology such as artificial intelligence and big data analytics is likely to increase the demand for high-performance all-flash storage arrays.

Most data centers are shifting to high-capacity switches such as 100GbE, 200GbE, and 400GbE switches with a high number of ports at the core layer.

Diesel generators witness high adoption among data center operators in Hong Kong, with a few opting for Diesel Rotary Uninterruptible Power Supply (DRUPS) systems.

Service operators adopt both water and air-based cooling techniques for cooling purposes.

The Hong Kong Government has implemented the Building Energy Efficiency Ordinance (BEEO) and the Fresh Water-Cooling Towers Scheme (FWCT Scheme) to improve energy efficiency among data centers.

The implementation of 42U, 45U, 47U, and 48U rack units is likely to increase during the forecast period.

The need for specific expertise for installation and commissioning services is growing with increased investments boosting job opportunities.

Several data center providers adopt brownfield construction due to the land shortage in Hong Kong.

Hong Kong Data Center Market Insights

In 2020, 5G was launched in Hong Kong by China Mobile Hong Kong, Hutchinson, and HKT. The 5G deployment has reduced latency, improved speed, and supported IoT devices.

Hybrid cloud services are gaining high traction in Hong Kong; hence, enterprises use private and public cloud environments to efficiently improve information sharing and manage data.

The country has major cloud service providers such as Amazon Web Services,

Microsoft, Google, Alibaba, and Tencent.

The Hong Kong government has deployed IoT sensors to collect real-time data on pollution, energy, and water levels in several cities.

In 2020, Microsoft announced the opening of Microsoft 5G IoT Makerspace powered by HKT at Hong Kong Cyberport, enabling the country's startups to explore IoT solutions with HKT's 5G network.

Insurance companies in the country use artificial intelligence (AI) and big data technology to improve efficiency and effectiveness.

In 2020, the Hong Kong government committed over USD 12.5 billion for digital innovation and technology.

Hong Kong Data Center Market Vendor Landscape

The Hong Kong data center market comprises several IT infrastructure providers, construction contractors, support infrastructure providers, and investors. Vendors have involved a flurry of infrastructure and construction activities. Arista Networks, Broadcom, Cisco Systems, Dell Technologies, Hewlett, and Packard Enterprise (HPE) are some of the leading IT infrastructure providers. Due to the outbreak of the COVID-19 pandemic, the data generation significantly increased, thereby driving the investment in the facilities. Vendors are offering innovative solutions to improve efficiency. The market is likely to witness new players who provide DCIM solutions, installation & commissioning services, and physical security services.

IT Infrastructure Providers

Cisco Systems

Dell Technologies

Fujitsu

Hewlett Packard Enterprise (HPE)

IBM

Inspur

Lenovo

NetApp

Construction Service Providers

Arup

Aurecon Group

BYME Engineering (HK)

Chung Hing Engineers

Cundall

DSCO Group

Faithful+Gould

Gammon Construction

ISG

Studio One Design

Support Infrastructure Providers

ABB

Caterpillar

Cummins

Eaton

Rolls-Royce Power Systems

Mitsubishi Electric

Legrand

Rittal

Schneider Electric

Vertiv

Data Center Investors

AirTrunk Operating

CITIC Telecom International Holdings

Digital Realty

Equinix

GDS Holdings

Global Switch

PCCW

SUNeVision (iAdvantage)

Report Coverage:

This report offers Hong Kong Data Center market share analysis and an elaborative analysis of the existing and upcoming facilities, datacenter investments in IT, electrical, mechanical infrastructure, general construction, and geography. It discusses market

sizing and estimation for different segments with respect to the investment in data centers. The segmentation includes:

EXISTING VS. UPCOMING DATA CENTERS

Existing Facilities (Area and Power Capacity)

Tsuen Wan

Kwai Chung

Tseung Kwan O

Fo Tan

Chai Wan

Tai Po

Other locations (Kwun Tong, Wan Chai, Sheung Wan, San Po Kong, Kowloon, Wong Chuk Hang, Ap Lei Chau, Fanling)

List of Upcoming Facilities (Area and Power Capacity)

Hong Kong Data Center Investment Coverage

Infrastructure Type

IT Infrastructure

Electrical Infrastructure

Mechanical Infrastructure

General Construction

IT Infrastructure

Server

Storage

Network

Electrical Infrastructure

Uninterruptible Power Supply (UPS)

Generators

Transfer Switches and Switchgears

PDUs

Other Electrical Infrastructure

Mechanical Infrastructure

Cooling Systems

Rack Cabinets

Other Mechanical Infrastructure

Cooling Systems

CRAC & CRAH Units

Chillers

Cooling Towers & Dry Coolers

Economizers & Evaporative Coolers

Other Cooling Units

General Construction

Building Development

Installation & Commissioning Services

Building & Engineering Design

Physical Security

DCIM

Tier Segments

Tier I & Tier II

Tier III

Tier IV

Target Audience

Datacenter Real Estate Investment Trusts (REIT)

Datacenter Construction Contractors

Datacenter Infrastructure Providers

New Entrants

Consultants/Consultancies/Advisory Firms

Corporate and Governments Agencies

Why Should You Buy This Research?

Market size available in terms of investment, area, power capacity, and colocation revenue.

An assessment of the Hong Kong data center market investment by colocation, hyperscale, and enterprise operators

Data center investments in terms of area (square feet) and power capacity (MW) across cities in the country

A detailed study of the existing Hong Kong data center market landscape, an in-depth industry analysis, and insightful predictions about the Hong Kong data center market size during the forecast period

Snapshot of existing and upcoming third-party facilities in Hong Kong

Facilities Covered (Existing): 50

Facilities Identified (Upcoming): 6

Coverage: Over 7 Regions

Existing vs. Upcoming (Data Center Area)

Existing vs. Upcoming (IT Load Capacity)

Data center colocation market in Hong Kong

Market Revenue & Forecast (2020-2026)

Retail Colocation Pricing

Wholesale Colocation Pricing

Classification of the Hong Kong data center market investments into multiple segments and sub-segments (IT, electrical, mechanical, and general construction services) with market sizing and forecast

A comprehensive analysis of the latest trends, growth rate, potential opportunities, and growth restraints, and prospects for the data center market

Business overview and product offerings of prominent IT infrastructure

providers, construction contractors and sub-contractors, support infrastructure providers, and data center investors operating in the market

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Fo Tan

Kwai Chung

Tai Po

Tseung Kwan O

Tsuen Wan

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