

Internet Data Center Market in China and Hong Kong - 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 China and Hong Kong Data Center Market Report

The China and Hong Kong data center market by investment is expected to grow at a CAGR of approx. 4% during the period 2020–2026.

The emergence of the 5G network has been a significant boost to the China & Hong Kong edge data center market. China and Hong Kong governments have been actively supporting the improvement of networking infrastructure in their countries. The implementation of 5G has boosted the digital economy, leading to the increased demand for high bandwidth networking infrastructure. Chinese telecom operators in the region are incredibly active in the implementation of 5G infrastructure. Operators such as China Telecom, China Unicom, and China Mobile are the major players in the 5G landscape. Over 700,000 5G sites were built by these three operators in 2020 and are likely to add 600,000 base stations in 2021 for the implementation of 5G network. China Unicom has deployed edge data centers in the region. Turbidite, an edge data center platform, launched in March 2021, develops international-standard edge data centers across APAC countries, including China and Hong Kong. The company is in the process of acquiring and developing carrier-neutral edge data centers that will support enterprises and hyperscale data center developers to establish their presence in the APAC region. It is expected that the number of connected devices will triple by the end of the forecast period, and smart city growth will involve data centers nearer to customer locations. These deployments will continue to drive innovations in the data center power space, with increased modular infrastructure offerings.

The following factors are likely to contribute to the growth of the China and Hong Kong

data center market during the forecast period:

Implementation of 5G driving Edge Data Centers

Smart Cities fueling Data Center Demand

Renewable Energy reducing Power Cost

The rise in AI, Blockchain & Quantum Computing Investment

The study considers the present scenario of the China and Hong Kong 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.

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, cooling systems, cooling technique, general construction, tier standards, geography. The China & Hong Kong IT Infrastructure market expects to reach over USD 28 billion in 2026, growing at a CAGR of over 3%. Servers are the major revenue contributor to the market as the growth in data generation is fueling demand for fast processing efficient servers. Servers comprising AI-enabled features such as data analytics, development of AI-enabled applications, flexible deployment of data expect to increase the demand during the forecast period.

The electrical infrastructure market in China & Hong Kong is likely to grow at a CAGR of approx. 4% during 2020–2026. In China & Hong Kong, data centers are designed to be of Tier III and Tier IV standards, with the high deployment of 2N redundant UPS systems, coupled with generators and other infrastructure adopting N+N redundancy. The adoption of Diesel Rotary Uninterruptible Power Supply (DRUPS) systems is growing in the Hong Kong market. DRUPS solutions are likely to witness high demand among data centers, with multiple modules having a total capacity of up to 2 MW and N+N or 2N redundant configurations. The adoption of intelligent PDU solutions such as metered and monitored PDU dominates in terms of investments. The adoption of modular infrastructure solutions in prefabricated data center deployment is increasing,

continuing to grow and contributing to the market investment by the end of the forecast period.

In China, most facilities are colocation and adopt a combination of air and water-based cooling techniques to cool facilities; however, a few are built to support free cooling techniques. In Beijing, a majority of data centers are colocation based and adopt a combination of air and water-based cooling techniques to cool down the facility. Most facilities have installed chilled water-cooling systems. The increased use of rack scale converged infrastructure systems in data centers will impact the rack market, affecting rack adoption. In 2020, the China and Hong Kong data center market witnessed a rack capacity of over 1,00,000. Vendors are constantly innovating rack designs to provide airflow perforation (80%), enhance cabling channels, and support more weight capacity.

Several data centers use CRAC and CRAH units to supply cold air and exhaust hot air from the data hall. With data centers now built to handle over 10 MW of IT load, the use of multiple CRAC and CRAH units split across data halls is growing. The market will continue to grow among data centers that use DX or chilled-water cooling solutions. The adoption of chiller units expects to be higher in the market. All high-density data centers in the region depend on chilled water to cool their facilities. Hence, the use of free cooling systems is partially viable in these locations. Data centers in China & Hong Kong are developed to derive benefits from free cooling techniques. The use of evaporative coolers is also gaining traction in these countries, along with the adoption of evaporative cooling systems.

China is leading the greenfield construction of data centers. Hyperscale developments expect to increase the demand for engineering services in China. Most data centers in Beijing have 24X7 onsite support, including security, maintenance, smart hands teams. In addition, facilities are equipped with disaster recovery systems. Due to the limited availability of land, brownfield construction has witnessed growth in Hong Kong, and this trend is likely to continue during the forecast period. Most facilities in China prefer at least four layers of safety, with few engaged in implementing five-layer ones due to the increasing demand for colocation services.

Several mega data center projects are designed to be of Tier III and Tier IV standards in China. Tier III and Tier IV facilities dominate the China and Hong Kong data center market share, expecting to account for USD 4 billion and USD 2 billion, respectively, by 2026. Around 30 data centers in China & Hong Kong fall under the Tier III category. Equinix, GDS Services Ltd, Global Switch, and China Unicom are major vendors developing Tier III standards facilities. Several facilities in China have received Tier IV

Certification for design from the Uptime Institute. These facilities generate more revenue for the market, with focused investment on highly efficient cooling systems. Tier IV facilities involve the adoption of 2N+1 cooling units.

By IT Infrastructure

Servers

Storage

Network

By Electrical Infrastructure

UPS Systems

Generators

Transfer Switches and Switchgears

PDU's

Other Electrical Infrastructures

By Mechanical Infrastructure

Cooling Systems

CRAC & CRAH Units

Chiller Units

Cooling Towers, Dry Coolers, & Condensers

Economizers and Evaporative Coolers, and Other Units

Racks

Other Mechanical Infrastructure

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

Physical Security

DCIM/BMS

By Tier Standards

Tier I & II

Tier III

Tier IV

INSIGHTS BY GEOGRAPHY

China accounts for the highest revenue share, expecting to constitute over USD 5.6 billion by 2026. The data center market in China is growing YOY aided by the strong growth in internet connectivity across the country and an increasing number of submarine cable deployments connecting the country. Data center demand in China will exceed supply due to the rising demand for cloud-based services, big data analytics, and IoT. The high demand for data centers is likely to boost the development of colocation facilities and prompt regional cloud service providers to establish multiple availability zones in China. The installation of 5G in Beijing is driving the construction of edge and colocation data centers. The government has planned to develop a pilot trade zone for big data exchange and digital trade in Beijing. The increased focus on digital industrialization, industry digitization, data valuation, digital governance, and digital trade development is likely to influence China's market growth.

By Geography

China

Beijing

Shanghai

Other Cities

Hong Kong

INSIGHTS BY VENDORS

China & Hong Kong is one of the most developed data center markets. The data center market in China and Hong Kong is still witnessing growth in terms of investment from global and local data center operators. Due to the COVID-19 pandemic, the data generation significantly increased this derived investment in data centers. Vendors are offering innovative solutions for data centers to improve efficiency of data centers. The market is likely to witness the entry of new players that provide DCIM solutions, installation & commissioning services, and physical security services. The success of new entrants mainly depends on their market expertise and understanding of local regulations. The Princeton Digital Group, GDS Services, and BDx invested in the region

in 2020. These providers are either building data centers or acquiring existing facilities to create a foundation for expansion in the future years.

Key Data Center Critical (IT) Infrastructure Providers

Hewlett Packard Enterprise (HPE)

Cisco Systems

Dell Technologies

Hitachi Vantara Corporation

Huawei Technologies

IBM

Inspur

Lenovo

Quanta Cloud Technology (Quanta Computer)

Key Data Center Support Infrastructure Providers

ABB

Vertiv

Caterpillar

Cummins

Delta Electronics

Eaton

Fuji Electric

Schneider Electric

HITEC Power Protection

Mitsubishi Electric Corporation

Legrand

Rittal

Rolls-Royce Power Systems

AIRSYS

Shenzhen Kstar Science and Technology

Key Data Center Investors

Apple

AirTrunk Operating

Amazon Web Services (AWS)

21Vianet

BDx

Chayora

China Unicom

Chindata

CITIC Telecom International Holdings

Equinix

GDS Services

Global Switch

OneAsia Network

Telekomunikasi Indonesia (Persero)

PCCW Global Solutions

Princeton Digital Group

SUNeVision (iAdvantage)

Shanghai AtHub

Shanghai Qnet Networking Technology

Tencent Holdings

Tenglong Holdings Group (Tamron)

Key Construction Constructors

Arup Group

Aurecom Group

AWP Architects

BYME Engineering (HK)

Chung Hing Engineers Group

DSCO Group

Faithful+Gould

Gammon Construction

ISG

Studio One Design

NTT Global Data Centers

KEY QUESTIONS ANSWERED

1. How big is the China and Hong Kong Data Center market size?
2. What is the growth of Tier III data centers in China and Hong Kong?
3. What is the growth rate of the China and Hong Kong Data Center Market?
4. What are the new investment opportunities in the data center market?
5. Who are the key players in 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 Cooling Techniques

4.4.7 Market Segmentation by General Construction

4.4.8 Market Segmentation by Tier Standards

4.4.9 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 Overview

8 MARKET OPPORTUNITIES & TRENDS

8.1 5G Implementation To Drive Edge Data Centers

- 8.2 Smart Cities Fuel Data Center Demand
- 8.3 Renewable Energy To Reduce Power Cost
- 8.4 Rising Investment In AI, Blockchain & Quantum Computing

9 MARKET GROWTH ENABLERS

- 9.1 Data Center Investments Continue To Rise
- 9.2 Impact Of COVID-19 On Data Center Investments
- 9.3 Growing Demand For Hyperscale Data Centers
- 9.4 Increased Adoption Of Cloud Services
- 9.5 Big Data & IoT Spending To Drive Data Center Investment

10 MARKET RESTRAINTS

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

11 MARKET LANDSCAPE

- 11.1 Market Overview
- 11.2 Investment: Market Size & Forecast
- 11.3 Area: Market Size & Forecast
- 11.4 Power Capacity: Market Size & Forecast
- 11.5 Five Forces Analysis
 - 11.5.1 Threat of New Entrants
 - 11.5.2 Bargaining Power of Suppliers
 - 11.5.3 Bargaining Power of Buyers
 - 11.5.4 Threat of Substitutes
 - 11.5.5 Competitive Rivalry

12 INFRASTRUCTURE

- 12.1 Market Snapshot & Growth Engine
- 12.2 IT Infrastructure
 - 12.2.1 Market Overview
 - 12.2.2 Market Size & Forecast
- 12.3 Electrical Infrastructure
 - 12.3.1 Market Overview

- 12.3.2 Market Size & Forecast
- 12.4 Mechanical Infrastructure
 - 12.4.1 Market Overview
 - 12.4.2 Market Size & Forecast
- 12.5 General Construction
 - 12.5.1 Market Overview
 - 12.5.2 Market Size & Forecast

13 IT INFRASTRUCTURE

- 13.1 Market Snapshot & Growth Engine
- 13.2 Server Infrastructure
 - 13.2.1 Market Overview
- 13.3 Storage Infrastructure
 - 13.3.1 Market Overview
 - 13.3.2 Market Size & Forecast
- 13.4 Network Infrastructure
 - 13.4.1 Market Overview
 - 13.4.2 Market Size & Forecast

14 ELECTRICAL INFRASTRUCTURE

- 14.1 Market Snapshot & Growth Engine
- 14.2 UPS Systems
 - 14.2.1 Market Overview
 - 14.2.2 Market Size & Forecast
- 14.3 Generators
 - 14.3.1 Market Overview
 - 14.3.2 Market Size & Forecast
- 14.4 Transfer Switches & Switchgear
 - 14.4.1 Market Overview
 - 14.4.2 Market Size & Forecast
- 14.5 PDU
 - 14.5.1 Market Overview
 - 14.5.2 Market Size & Forecast
- 14.6 Other Electrical Infrastructure
 - 14.6.1 Market Overview
 - 14.6.2 Market Size & Forecast

15 MECHANICAL INFRASTRUCTURE

15.1 Market Snapshot & Growth Engine

15.2 Cooling Systems

15.2.1 Market Overview

15.2.2 Market Size & Forecast

15.3 Racks

15.3.1 Market Overview

15.3.2 Market Size & Forecast

15.4 Other Mechanical Infrastructure

15.4.1 Market Overview

15.4.2 Market Size & Forecast

16 COOLING SYSTEMS

16.1 Market Snapshot & Growth Engine

16.2 CRAC & CRAH Units

16.2.1 Market Overview

16.2.2 Market Size & Forecast

16.3 Chiller Units

16.3.1 Market Overview

16.3.2 Market Size & Forecast

16.4 Cooling Towers, Dry Coolers & Condensers

16.4.1 Market Overview

16.4.2 Market Size & Forecast

16.5 Economizers & Evaporative Coolers

16.5.1 Market Overview

16.5.2 Market Size & Forecast

16.6 Other Cooling Units

16.6.1 Market Overview

16.6.2 Market Size & Forecast

17 COOLING TECHNIQUE

17.1 Market Snapshot & Growth Engine

17.2 Air-Based Cooling Techniques

17.2.1 Market Overview

17.2.2 Market Size & Forecast

17.3 Liquid-Based Cooling Techniques

17.3.1 Market Overview

17.3.2 Market Size & Forecast

18 GENERAL CONSTRUCTION

18.1 Market Snapshot & Growth Engine

18.2 Core & Shell Development

18.2.1 Market Overview

18.2.2 Market Size & Forecast

18.3 Installation & Commissioning Services

18.3.1 Market Overview

18.3.2 Market Size & Forecast

18.4 Building & Engineering Design

18.4.1 Market Overview

18.4.2 Market Overview

18.5 Physical Security

18.5.1 Market Overview

18.5.2 Market Size & Forecast

18.6 DCIM/BMS Solutions

18.6.1 Market Overview

18.6.2 Market Size & Forecast

19 TIER STANDARDS

19.1 Market Snapshot & Growth Engine

19.2 Overview of Tier Standards

19.3 Tier I & Tier II

19.3.1 Market Overview

19.3.2 Market Size & Forecast

19.4 Tier III

19.4.1 Market Overview

19.4.2 Market Size & Forecast

19.5 Tier IV

19.5.1 Market Overview

19.5.2 Market Size & Forecast

20 GEOGRAPHY

20.1 Market Snapshot & Growth Engine

20.2 Area: Snapshot & Growth Engine

20.3 Power Capacity: Snapshot & Growth Engine

21 CHINA

21.1 Market Snapshot & Growth Engine

21.2 Market Overview

21.2.1 Investment: Market Size & Forecast

21.2.2 Area: Market Size & Forecast

21.2.3 Power Capacity: Market Size & Forecast

21.2.4 Support Infrastructure: Market Size & Forecast

21.3 Beijing

21.3.1 Market Snapshot & Growth Engine

21.3.2 Market Overview

21.3.3 Investment: Size & Forecast

21.3.4 Area: Market Size & Forecast

21.3.5 Power Capacity: Market Size & Forecast

21.3.6 Support Infrastructure: Market Size & Forecast

21.4 Shanghai

21.4.1 Market Snapshot & Growth Engine

21.4.2 Market Overview

21.4.3 Investment: Size & Forecast

21.4.4 Area: Market Size & Forecast

21.4.5 Power Capacity: Market Size & Forecast

21.4.6 Support Infrastructure: Market Size & Forecast

21.5 Other Chinese Cities

21.5.1 Market Snapshot & Growth Engine

21.5.2 Market Overview

21.5.3 Investment: Size & Forecast

21.5.4 Area: Market Size & Forecast

21.5.5 Power Capacity: Market Size & Forecast

21.5.6 Support Infrastructure: Market Size & Forecast

22 HONG KONG

22.1 Market Snapshot & Growth Engine

22.1.1 Market Overview

22.1.2 Investment: Size & Forecast

22.1.3 Area: Market Size & Forecast

22.1.4 Power Capacity: Market Size & Forecast

22.1.5 Support Infrastructure: Market Size & Forecast

23 COMPETITIVE LANDSCAPE

23.1 Competition Overview

23.1.1 Infrastructure Providers

23.1.2 Construction Contractors

23.1.3 Data Center Investors

24 PROMINENT IT INFRASTRUCTURE VENDORS

24.1 Hewlett Packard Enterprise

24.1.1 Business Overview

24.1.2 Product Offerings

24.2 CISCO Systems

24.2.1 Business Overview

24.2.2 Product Offerings

24.3 Dell Technologies

24.3.1 Business Overview

24.3.2 Product Offerings

24.4 Hitachi Vantara Corporation

24.4.1 Business Overview

24.4.2 Product Offerings

24.5 Huawei Technologies

24.5.1 Business Overview

24.5.2 Product Offerings

24.6 IBM

24.6.1 Business Overview

24.6.2 Product Offerings

24.7 Inspur

24.7.1 Business Overview

24.7.2 Product Offerings

24.8 Lenovo

24.8.1 Business Overview

24.8.2 Product Offerings

24.9 Quanta Cloud Technology (Quanta Computer)

24.9.1 Business Overview

24.9.2 Product Offerings

25 PROMINENT SUPPORT INFRASTRUCTURE PROVIDERS

25.1 ABB

25.1.1 Business Overview

25.1.2 Product Offerings

25.2 Vertiv

25.2.1 Business Overview

25.2.2 Product Offerings

25.3 Caterpillar

25.3.1 Business Overview

25.3.2 Product Offerings

25.4 Cummins

25.4.1 Business Overview

25.4.2 Product Offerings

25.5 Delta Power Solutions

25.5.1 Business Overview

25.5.2 Product Offerings

25.6 Eaton

25.6.1 Business Overview

25.6.2 Product Offerings

25.7 Fuji Electric

25.7.1 Business Overview

25.7.2 Product Offerings

25.8 Schneider Electric

25.8.1 Business Overview

25.8.2 Product Offerings

25.9 Hitec Power Protection

25.9.1 Business Overview

25.9.2 Product Offerings

25.9.3 Key News

25.10 Mitsubishi Electric Corporation

25.10.1 Business Overview

25.10.2 Product Offerings

25.10.3 Key News

25.11 Legrand

25.11.1 Business Overview

25.11.2 Product Offerings

25.12 Rittal

- 25.12.1 Business Overview
- 25.12.2 Product Offerings
- 25.13 Rolls-Royce Power Systems
 - 25.13.1 Business Overview
 - 25.13.2 Product Offerings
- 25.14 Airsys Group
 - 25.14.1 Business Overview
 - 25.14.2 Product Offerings
- 25.15 Shenzhen Kstar Science And Technology
 - 25.15.1 Business Overview
 - 25.15.2 Product Offerings

26 PROMINENT CONSTRUCTION CONTRACTORS

- 26.1 Arup
 - 26.1.1 Business Overview
 - 26.1.2 Service Offerings
- 26.2 Aurecom Group
 - 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 (HK)
 - 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
 - 26.10.1 Business Overview
 - 26.10.2 Service Offerings
- 26.11 NTT Global Data Centers
 - 26.11.1 Business Overview
 - 26.11.2 Service Offerings

27 PROMINENT DATA CENTER INVESTORS

- 27.1 Apple
 - 27.1.1 Business Overview
 - 27.1.2 Service Offerings
- 27.2 Airtrunk Operating
 - 27.2.1 Business Overview
 - 27.2.2 Service Offerings
 - 27.2.3 Key News
- 27.3 Amazon Web Services (AWS)
 - 27.3.1 Business Overview
 - 27.3.2 Service Offerings
- 27.4 21VIANET
 - 27.4.1 Business Overview
 - 27.4.2 Service Offerings
- 27.5 BDX
 - 27.5.1 Business Overview
 - 27.5.2 Service Offerings
 - 27.5.3 Key News
- 27.6 Chayora
 - 27.6.1 Business Overview
 - 27.6.2 Service Offerings
- 27.7 China Unicom
 - 27.7.1 Business Overview
 - 27.7.2 Service Offerings
- 27.8 Chindata
 - 27.8.1 Business Overview
 - 27.8.2 Service Offerings
 - 27.8.3 Key News
- 27.9 Citic Telecom International Holdings

- 27.9.1 Business Overview
- 27.9.2 Service Offerings
- 27.10 Equinix
 - 27.10.1 Business Overview
 - 27.10.2 Service Offerings
- 27.11 GDS Services
 - 27.11.1 Business Overview
 - 27.11.2 Service Offerings
 - 27.11.3 Key News
- 27.12 Global Switch
 - 27.12.1 Business Overview
 - 27.12.2 Service Offerings
- 27.13 Oneasia Network
 - 27.13.1 Business Overview
 - 27.13.2 Product Offerings
- 27.14 Telekomunikasi Indonesia (PERSERO)
 - 27.14.1 Business Overview
 - 27.14.2 Service Offerings
- 27.15 PCCW Global Solutions
 - 27.15.1 Business Overview
 - 27.15.2 Service Offerings
- 27.16 Princeton Digital Group
 - 27.16.1 Business Overview
 - 27.16.2 Service Offerings
- 27.17 Sunevision (IADVANTAGE)
 - 27.17.1 Business Overview
 - 27.17.2 Service Offerings
- 27.18 Shanghai Atrium (Athub)
 - 27.18.1 Business Overview
 - 27.18.2 Service Offerings
- 27.19 Shanghai Qnet Networking Technology
 - 27.19.1 Business Overview
 - 27.19.2 Service Offerings
- 27.20 Tencent Holdings
 - 27.20.1 Business Overview
 - 27.20.2 Service Offerings
- 27.21 Tenglong Holdings Group (TAMRON)
 - 27.21.1 Business Overview
 - 27.21.2 Service Offerings

28 REPORT SUMMARY

28.1 Key Takeaways

29 QUANTITATIVE SUMMARY

29.1 China & Hong Kong Data Center Market

29.1.1 Investment: Market Size & Forecast

29.1.2 Overall Market (Including IT Infrastructure)

29.1.3 Infrastructure: Market Size & Forecast

29.2 Market Segmentation

29.2.1 IT Infrastructure: Market Size & Forecast

29.2.2 Electrical Infrastructure: Market Size & Forecast

29.2.3 Mechanical Infrastructure: Market Size & Forecast

29.2.4 Cooling Systems: Market Size & Forecast

29.2.5 Cooling Techniques: Market Size & Forecast

29.2.6 General Construction: Market Size & Forecast

29.2.7 Tier Standards: Market Size & Forecast

29.3 Geographical Segmentation

29.3.1 Investment: Market Size & Forecast

29.3.2 Area: Market Size & Forecast

29.3.3 Power Capacity: Market Size & Forecast

29.4 China

29.4.1 Investment: Market Size & Forecast

29.4.2 Infrastructure: Market Size & Forecast

29.5 Beijing

29.5.1 Investment: Market Size & Forecast

29.5.2 Infrastructure: Market Size & Forecast

29.6 Shanghai

29.6.1 Investment: Market Size & Forecast

29.6.2 Infrastructure: Market Size & Forecast

29.7 Other Chinese Cities

29.7.1 Investment: Market Size & Forecast

29.7.2 Infrastructure: Market Size & Forecast

29.8 Hong Kong

29.8.1 Investment: Market Size & Forecast

29.8.2 Infrastructure: Market Size & Forecast

30 APPENDIX

30.1 Abbreviations

List Of Exhibits

LIST OF EXHIBITS

- Exhibit 1 Segmentation of Data Center Market in China & Hong Kong
- Exhibit 2 Market Size Calculation Approach 2020
- Exhibit 3 Impact of 5G Implementation to Drive Edge Data Centers
- Exhibit 4 Impact of Smart Cities Fuel Data Center Demand
- Exhibit 5 Impact of Renewable Energy to Reduce Power Cost
- Exhibit 6 Impact of Rising Investment in AI, Blockchain & Quantum Computing
- Exhibit 7 Impact of Data Center Investments Continue to Rise
- Exhibit 8 China & Hong Kong Data Center Investment (Number of Projects) 2020
- Exhibit 9 Data Center Investment
- Exhibit 10 Impact of COVID-19 on Data Center Investments
- Exhibit 11 Impact of COVID-19 on Data Center Market in CHK in 2020
- Exhibit 12 Impact of Growing Demand for Hyperscale Data Centers
- Exhibit 13 China & Hong Kong Data Center Hyperscale Investment (Number of Projects) 2020
- Exhibit 14 Impact of Increased Adoption of Cloud Services
- Exhibit 15 Impact of Big Data & IoT Spending to Drive Data Center Investment
- Exhibit 16 Impact of Regulatory Hurdles for Doing Business
- Exhibit 17 Impact of Land Scarcity in Hong Kong Impacts Data Center Growth
- Exhibit 18 Impact of Air Pollution Restricts Free Cooling
- Exhibit 19 China & Hong Kong Data Center Market 2020–2026 (\$ billion)
- Exhibit 20 China & Hong Kong Data Center Market by Area 2020-2026 (million square feet)
- Exhibit 21 China & Hong Kong Data Center Market by Power Capacity 2020-2026 (MW)
- Exhibit 22 Five Forces Analysis 2020
- Exhibit 23 Incremental Growth by Infrastructure 2020 & 2026
- Exhibit 24 China & Hong Kong Data Center IT Infrastructure Market 2020?2026 (\$ billion)
- Exhibit 25 China & Hong Kong Data Center IT Infrastructure Market 2020 & 2026 (\$ billion)
- Exhibit 26 China & Hong Kong Data Center Electrical Infrastructure Market 2020?2026 (\$ billion)
- Exhibit 27 China & Hong Kong Data Center Electrical Infrastructure Market 2020 & 2026 (\$ million)
- Exhibit 28 China & Hong Kong Data Center Mechanical Infrastructure Market 2020?2026 (\$ billion)

Exhibit 29 China & Hong Kong Data Center Mechanical Infrastructure Market 2020 & 2026 (\$ million)

Exhibit 30 China & Hong Kong Data Center General Construction Market 2020?2026 (\$ billion)

Exhibit 31 CHK Data Center General Construction Market 2020 & 2026 (\$ million)

Exhibit 32 Incremental Growth by IT Infrastructure 2020 & 2026

Exhibit 33 China & Hong Kong Data Center Server Infrastructure Market 2020?2026 (\$ billion)

Exhibit 34 China & Hong Kong Data Center Storage Infrastructure Market 2020?2026 (\$ billion)

Exhibit 35 China & Hong Kong Data Center Network Infrastructure Market 2020?2026 (\$ billion)

Exhibit 36 Incremental Growth by Electrical Infrastructure 2020 & 2026

Exhibit 37 China & Hong Kong Data Center UPS Systems Market 2020?2026 (\$ million)

Exhibit 38 CHK Data Center Generator Market 2020?2026 (\$ million)

Exhibit 39 China & Hong Kong Data Center Transfer Switches & Switchgear Market 2020?2026 (\$ million)

Exhibit 40 China & Hong Kong Data Center PDU Market 2020?2026 (\$ million)

Exhibit 41 CHK Data Center Other Electrical Infrastructure Market 2020?2026 (\$ million)

Exhibit 42 Incremental Growth by Mechanical Infrastructure 2020 & 2026

Exhibit 43 China & Hong Kong Data Center Cooling Systems Market 2020?2026 (\$ million)

Exhibit 44 China & Hong Kong Data Center Rack Market 2020?2026 (\$ million)

Exhibit 45 China & Hong Kong Data Center Other Mechanical Infrastructure Market 2020?2026 (\$ million)

Exhibit 46 Incremental Growth by Cooling Systems 2020 & 2026

Exhibit 47 China & Hong Kong Data Center CRAC & CRAH Units Market 2020?2026 (\$ million)

Exhibit 48 China & Hong Kong Data Center Chiller Units Market 2020?2026 (\$ million)

Exhibit 49 China & Hong Kong Data Center Cooling Tower, Dry Coolers & Condensers Market 2020?2026 (\$ million)

Exhibit 50 China & Hong Kong Data Center Economizers & Evaporative Coolers Market 2020?2026 (\$ million)

Exhibit 51 China & Hong Kong Data Center Other Cooling Units Market 2020?2026 (\$ million)

Exhibit 52 Incremental Growth by Cooling Technique 2020 & 2026

Exhibit 53 China & Hong Kong Data Center Air-Based Cooling Market 2020?2026 (\$ million)

Exhibit 54 China & Hong Kong Data Center Liquid-Based Cooling Market 2020?2026 (\$

million)

Exhibit 55 Incremental Growth by General Construction 2020 & 2026

Exhibit 56 China & Hong Kong Data Center Core & Shell Development Market
2020?2026 (\$ million)

Exhibit 57 CHK Data Center Installation & Commissioning Services Market 2020?2026
(\$ million)

Exhibit 58 China & Hong Kong Data Center Building & Engineering Design Market
2020?2026 (\$ million)

Exhibit 59 China & Hong Kong Data Center Physical Security Market 2020?2026 (\$
million)

Exhibit 60 China & Hong Kong Data Center DCIM/ BMS Solutions Market 2020?2026 (\$
million)

Exhibit 61 Incremental Growth by Tier Standards 2020?2026

Exhibit 62 Overview of Tier Standards

Exhibit 63 CHK Data Center Market by Tier Standards (\$ million)

Exhibit 64 China & Hong Kong Data Center Market by Tier I & Tier II 2020–2026 (\$
million)

Exhibit 65 China & Hong Kong Tier III Data Center Market 2020–2026 (\$ million)

Exhibit 66 China & Hong Kong Tier IV Data Center Market 2020–2026 (\$ million)

Exhibit 67 Incremental Growth by Geography 2020?2026 (\$ million)

Exhibit 68 Incremental Growth by Geography 2020 & 2026 (\$ million)

Exhibit 69 Incremental Growth by Geography 2020?2026 (Million Square Feet)

Exhibit 70 Incremental Growth by Geography 2020?2026 (MW)

Exhibit 71 Snapshot ? China Data Center Market 2020?2026

Exhibit 72 China Data Center Market 2020?2026 (\$ million)

Exhibit 73 China Data Center Market by Area 2020?2026 (Million Square Feet)

Exhibit 74 China Data Center Market by Power Capacity 2020?2026 (MW)

Exhibit 75 China Data Center Infrastructure Market 2020?2026 (\$ million)

Exhibit 76 Snapshot ? Beijing Data Center Market 2020?2026

Exhibit 77 Beijing Data Center Market 2020?2026 (\$ million)

Exhibit 78 Beijing Data Center Market by Area 2020?2026 (Million Square Feet)

Exhibit 79 Beijing Data Center Market by Power Capacity 2020?2026 (MW)

Exhibit 80 Beijing Data Center Infrastructure Market 2020?2026 (\$ million)

Exhibit 81 Snapshot ? Shanghai Data Center Market 2020?2026

Exhibit 82 Shanghai Data Center Market 2020?2026 (\$ million)

Exhibit 83 Shanghai Data Center Market by Area 2020?2026 (Million Square Feet)

Exhibit 84 Shanghai Data Center Market by Power Capacity 2020?2026 (MW)

Exhibit 85 Shanghai Data Center Infrastructure Market 2020?2026 (\$ million)

Exhibit 86 Snapshot ? Data Center Market in Other Chinese Cities 2020?2026

Exhibit 87 Other Chinese Cities Data Center Market 2020?2026 (\$ million)

Exhibit 88 Data Center Market in Other Chinese Cities by Area 2020?2026 (Million Square Feet)

Exhibit 89 Data Center Market in Other Chinese Cities by Power Capacity 2020?2026 (MW)

Exhibit 90 Data Center Infrastructure Market in Other Chinese Cities 2020?2026 (\$ million)

Exhibit 91 Snapshot ? Hong Kong Data Center Market 2020?2026

Exhibit 92 Hong Kong Data Center Market 2020?2026 (\$ million)

Exhibit 93 Hong Kong Data Center Market by Area 2020?2026 (Million Square Feet)

Exhibit 94 Hong Kong Data Center Market by Power Capacity 2020?2026 (MW)

Exhibit 95 Hong Kong Data Center Infrastructure Market 2020?2026 (\$ million)

List Of Tables

LIST OF TABLES

Table 1 Key Caveats

Table 2 Currency Conversion 2013?2020

Table 3 List of Submarine Fiber Cable Projects

Table 4 China & Hong Kong Data Center Market by Geography 2020- 2026

Table 5 China & Hong Kong Data Market; IT & Support Infrastructure 2020?2026

Table 6 China & Hong Kong Data Center Infrastructure Market 2020?2026

Table 7 China & Hong Kong Data Center IT Infrastructure Market 2020?2026 (\$ billion)

Table 8 China & Hong Kong Data Center Electrical Infrastructure Market 2020?2026 (\$ million)

Table 9 China & Hong Kong Data Center Mechanical Infrastructure Market 2020?2026 (\$ million)

Table 10 China & Hong Kong Data Center Cooling Systems Market 2020?2026 (\$ million)

Table 11 China & Hong Kong Data Center Cooling Technique Market 2020?2026 (\$ million)

Table 12 China & Hong Kong Data Center General Construction Market 2020?2026 (\$ million)

Table 13 China & Hong Kong Data Center Market by Tier Standards 2020?2026 (\$ million)

Table 14 China & Hong Kong Data Center Market by Geography 2020?2026 (\$ million)

Table 15 China & Hong Kong Data Center Market by Area 2020?2026 (million square feet)

Table 16 China & Hong Kong Data Center Market by Power Capacity 2020?2026 (MW)

Table 17 China Data Center Market 2020?2026

Table 18 China Data Center Infrastructure Market 2020?2026 (\$ million)

Table 19 Beijing Data Center Market 2020?2026

Table 20 Beijing Data Center Infrastructure Market 2020?2026 (\$ million)

Table 21 Shanghai Data Center Market 2020?2026

Table 22 Shanghai Data Center Infrastructure Market 2020?2026 (\$ million)

Table 23 Other Chinese Cities Data Center Market 2020?2026

Table 24 Other Chinese Cities Data Center Infrastructure Market 2020?2026 (\$ million)

Table 25 Hong Kong Data Center Market 2020?2026

Table 26 Hong Kong Data Center Infrastructure Market 2020?2026 (\$ million)

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