

# Japan 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 Japan Data Center Market Report

The Japan data center market size was valued at USD 7 billion in 2021 and is expected to reach USD 10 billion by 2026, growing at a CAGR of 7% during 2021-2026.

Japan is a mature data center market in the APAC region and has a strong presence as a corporate hub and global financial center. Other than being economically forward, it is also a leader in technology, robotics, and machine learning. The country hosts over 22 third-party data center service providers operating over 90 facilities. In addition, the country also includes several on-premise or dedicated data centers owned by local enterprises. Japan is one of the major connectivity hubs owing to its strategic location.

The report considers the present scenario of the Japanese 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:

Growing investments in start-ups such as FinTech and e-commerce using big data analytics and IoT applications is expected to increase the demand for all flash storage devices.

The rise in digital transformation and the adoption of cloud computing by enterprises due to because of the COVID-19 pandemic is likely to increase

cloud server adoption in Japan.

The implementation of 5G networks will increase the usage of new class ethernet switches among data centers in Japan.

The price of lithium-ion batteries has decreased over the years, which have observed high demand for lithium-ion UPS systems.

The share of diesel generators is expected to decline, with the adoption of gas generators in the market as they are fuel efficient and environment friendly.

Monitored and metered/switched PDUs will experience strong adoption in the market owing to the growing awareness of end-to-end power monitoring in data centers during the forecast period.

The Japanese data center market is dominated by direct free cooling solutions that will increase the adoption of duct systems in the facilities.

Evaporative and water-based economizer solutions support the adoption of pipes and valves in N+N redundancy.

Greenfield projects will witness an increased investment from local and global data center providers as they aim to expand their presence.

The DCIM adoption is likely to grow in the future as man-hours are reduced to handle critical data center tasks.

Infrastructure level monitoring is likely to increase than end-to-end facility management.

## Japan Data Center Market Insights

In 2020, Tokyo and Osaka were major data center investment destinations. Other regions such as Kobe, Nagoya, and Yokohama are expected to grow during the forecast period.

The cloud market in Japan was around USD 10 billion in 2020, including private and public clouds, which is expected to be valued at over USD 16 billion by

2023.

Sectors such as BFSI, healthcare, education, hospitality, government, and transport have migrated their resources to the cloud platform.

IoT-enabled devices have witnessed high acceptance in Japan, especially for monitoring and surveillance purposes, especially in the healthcare sector during the outbreak of the pandemic.

In 2020, Equinix and GIC formed a joint venture to develop xScale data centers in Japan supporting 138 MW on full-build.

The Japanese government has developed several policies to increase the supply of renewable energy and is expected to reach 24% of the energy mix by 2030.

The Japan Government is more focused to promote local companies, hence there are several challenges that foreign companies could face while setting up a business.

## Japan Data Center Market Vendor Landscape

Japan has a strong presence of regional data center providers. It is one of the fastest-growing digital markets in the world. Japan has evolved into an international data center market driven by global hyperscale cloud providers such as Amazon Web Services (AWS), Google, Microsoft Azure, and IBM, expanding in the Tokyo and Osaka regions. Cisco Systems, Fujitsu, Hewlett Packard Enterprise (HPE), Hitachi Vantara, Huawei Technologies, IBM, Inspur, Lenovo, NEC, and NetApp are the leading IT infrastructure provider operators in Japan.

### IT Infrastructure Providers

Cisco Systems

Fujitsu

Hewlett Packard Enterprise (HPE)

Hitachi Vantara

Huawei Technologies

IBM

Inspur

Lenovo

NEC

NetApp

#### Construction Service Providers

Fuji Furukawa Engineering & Construction

Hibiya Engineering

ISG

Kajima Corporation

Keihanshin Building

MARCAI DESIGN

Meiho Facility Works

NTT FACILITIES

Obayashi Corporation

SHINRYO

#### Support Infrastructure Providers

ABB

Caterpillar

Cummins

Eaton

Fuji Electric

HITEC Power Protection

Kawasaki Heavy Industries

KOHLER

Legrand

Mitsubishi Electric Corporation

Rittal

Rolls-Royce Power Systems

Schneider Electric

Vertiv Group

## Data Center Investors

AT TOKYO

AirTrunk Operating

ARTERIA Networks

Colt Data Centre Services

CTC

Cyxtera

Equinix

Fujitsu

IDC Frontier

Internet Initiative Japan (IIJ)

MC Digital Realty

NEC

NTT Communications

SCSK Corporation (netXDC)

Telehouse

TIS INTEC Group

Qualysite Technologies

#### Report Coverage:

This report offers analysis on the Japan Data Center market share and elaborative analysis of the existing and upcoming facilities, datacenter investments in terms of IT, electrical, mechanical infrastructure, general construction, and geography. It discusses market sizing and estimation for different segments with respect to the investment in the facilities. The segmentation includes:

Existing Vs. Upcoming Data Centers

Existing Facilities in the country (Area and Power Capacity)

Tokyo (No. of facilities: 57)

Osaka (No. of facilities: 14)

Other Cities (No. of facilities: 22)

List of Upcoming Facilities in the region (Area and Power Capacity)

## Market Segmentation by Infrastructure Type

IT Infrastructure

Electrical Infrastructure

Mechanical Infrastructure

General Construction

## Market Segmentation by IT Infrastructure

Server

Storage

Network

## Market Segmentation by Electrical Infrastructure

Uninterruptible Power Supply (UPS)

Generators

Transfer Switches and Switchgears

PDU's

Other Electrical Infrastructure

## Market Segmentation by Mechanical Infrastructure

Cooling Systems

Rack Cabinets

Other Mechanical Infrastructure

## Market Segmentation by Cooling Systems

CRAC & CRAH Units

Chillers

Cooling Towers, & Condensers, and Dry Coolers

Economizers & Evaporative Coolers

Other Cooling Units

## Market Segmentation by General Construction

Building Development

Installation and Commissioning Services

Building Design

Physical Security

DCIM

## Market Segmentation by Tier Segments



Tier I & Tier II

Tier III

Tier IV

## Market Segmentation by Geography

Tokyo

Osaka

Others

## 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 the area, power capacity, investment, and colocation revenue.

An assessment of the Japan data center investment in the market 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 Japan data center market landscape, an in-depth industry analysis, and insightful predictions about the Japan data center market size during the forecast period

Snapshot of existing and upcoming third-party facilities in Japan

Facilities Covered (Existing): 93

Facilities Identified (Upcoming): 8

Coverage: 21 Cities

Existing vs Upcoming (Data Center Area)

Existing vs Upcoming (IT Load Capacity)

Data center colocation market in Japan

Market Revenue & Forecast (2020-2026)

Retail Colocation Pricing

Wholesale Colocation Pricing

Classification of the Japan data center market investments into multiple segments and sub-segments (IT, power, cooling, and general construction services) with market sizing and forecast

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

Business overview and product offerings of prominent IT infrastructure providers, construction contractors, support infrastructure providers, and data center investors operating in the market

A transparent research methodology and the analysis of the demand and supply aspect of the market

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