

Asia Pacific Data Center Colocation Market - Forecasts from 2020 to 2025

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Abstracts

The Asia Pacific data center colocation market was valued at US\$10.182 billion in 2019 and is projected to expand at a CAGR of 18.55% over the forecast period to reach US\$28.264 billion by 2025. Asia Pacific region is home to some of the biggest and fastest-growing economies in the world. The economic importance of the region coupled with booming infrastructure and high adoption of IT solutions has augmented the demand for colocation space and is continuously driving the colocation market. Though an increasing number of players in the region will lead to cost pressure and more competition, the high demand for colocation space will drive the market over the next five years. In addition, as the data requirement keeps growing so is there rising demand for efficient Information Technology (IT) infrastructure in the region. Enterprises (small, medium and large) in the region which are facing challenges related to burgeoning data and are moving their services onto the cloud, colocation has become one of the preferred options. This has led to a movement towards leasing of colocation facilities which was traditionally dominated by owning Data Centers and having a dedicated team of IT professionals for maintaining and troubleshooting the issues.

Retail is holding significant share in the market

By location model, the Asia Pacific data center colocation market is segmented as wholesale and retail. As soon as an enterprise decides to opt for colocation spaces, it has two options: retail colocation or wholesale colocation. In retail colocation, the enterprise's leases required space within a data center, while in wholesale colocation, the enterprise leases the complete data center while it may or may not be managing the IT operations. Retail colocation is witnessing increased adoption across different regions on account of the benefits it offers and the changing market dynamics. The wholesale colocation providers have also started to lease out retail spaces within their

existing facilities, leading to a blurring of lines between these two types of solutions. Enterprises are now considering those solutions for implementation which offers the best of these types and thus a new form of the hybrid solution is gaining momentum

China is driving growth in the region

China has witnessed tremendous economic growth over the last decade and has also become the major economic superpower of the world. There have been consistently high investments in infrastructure across the country and the country has become a major manufacturing hub. These factors have led to major enterprises operating across different industry verticals to open offices and expand their operations in the country. Enterprises are also adopting the latest IT solutions to improve their business process efficiency by investing or outsourcing their IT infrastructure requirements. Cloud computing and virtualization have created a massive need for storage solutions and have amplified the need for Data Center infrastructure and colocation space. Beijing, Shanghai, and Shenzhen among others have emerged as major colocation centers in the country, although major colocation services are offered by the state-owned communication carriers.

Japan and India are making their way towards the market leader

Japan the third-largest economy in the world, Japan enjoys an internet literacy rate of 93% with a highly urbanized population. Many large and small enterprises have cemented their foot in the market. With the rising investments in research and development towards innovation and development of new technologies, the demand for data centers among various industries is already on a high and is expected to increase in the coming years. India is also considered as one of the most favorable outsourcing destinations, the pressure on organizations is significant to invest in IT infrastructure. Government programs such as “Jan Dhan Yojana”, “Make in India”, “Digital India” among others have augmented government spending in IT infrastructure solutions. The major hurdle for Data Centers and the colocation market in India is the power supply constraints but this is not expected to affect the market growth in the short term due to high demand from the government, BFSI, Telecommunication, and IT enterprises.

Segmentation:

By Colocation Model

Retail Colocation

Wholesale Colocation

By End Users

Small Enterprises

Medium Enterprises

Large Enterprises

By Industry Vertical

Banking and Financial Services

Manufacturing

Communication and Technology

Healthcare

Energy

Government

Media and Entertainment

Others

By Country

China

Japan

India

Australia

South Korea

Others

Contents

1. INTRODUCTION

- 1.1. Market Definition
- 1.2. Market Segmentation

2. RESEARCH METHODOLOGY

- 2.1. Research Data
- 2.2. Assumptions

3. EXECUTIVE SUMMARY

- 3.1. Research Highlights

4. MARKET DYNAMICS

- 4.1. Market Drivers
- 4.2. Market Restraints
- 4.3. Porters Five Forces Analysis
 - 4.3.1. Bargaining Power of Suppliers
 - 4.3.2. Bargaining Power of Buyers
 - 4.3.3. Threat of New Entrants
 - 4.3.4. Threat of Substitutes
 - 4.3.5. Competitive Rivalry in the Industry
- 4.4. Industry Value Chain Analysis

5. ASIA PACIFIC DATA CENTER COLOCATION MARKET ANALYSIS, BY COLOCATION MODEL

- 5.1. Introduction
- 5.2. Retail Colocation
- 5.3. Wholesale Colocation

6. ASIA PACIFIC DATA CENTER COLOCATION MARKET ANALYSIS, BY END USER

- 6.1. Introduction

- 6.2. Small Enterprises
- 6.3. Medium Enterprises
- 6.4. Large Enterprises

7. ASIA PACIFIC DATA CENTER COLOCATION MARKET ANALYSIS, BY INDUSTRY VERTICAL

- 7.1. Introduction
- 7.2. Banking and Financial Services
- 7.3. Manufacturing
- 7.4. Communication and Technology
- 7.5. Healthcare
- 7.6. Energy
- 7.7. Government
- 7.8. Media and Entertainment
- 7.9. Others

8. ASIA PACIFIC DATA CENTER COLOCATION MARKET ANALYSIS, BY COUNTRY

- 8.1. Introduction
- 8.2. China
- 8.3. Japan
- 8.4. India
- 8.5. Australia
- 8.6. South Korea
- 8.7. Others

9. COMPETITIVE ENVIRONMENT AND ANALYSIS

- 9.1. Major Players and Strategy Analysis
- 9.2. Emerging Players and Market Lucrativeness
- 9.3. Mergers, Acquisitions, Agreements, and Collaborations
- 9.4. Vendor Competitiveness Matrix

10. COMPANY PROFILES

- 10.1. Equinix
- 10.2. Rackspace

- 10.3. Telehouse
- 10.4. Verizon
- 10.5. SoftLayer
- 10.6. Technology Services
- 10.7. Zayo Group
- 10.8. CenturyLink
- 10.9. Coresite Reality Corporation
- 10.10. Internap
- 10.11. Net Data Centers
- 10.12. SingleHop

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