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Asia-Pacific Data Center - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Asia-Pacific Data Center Market size is estimated at 14.27 thousand MW in 2024, and is expected to reach 23.2 thousand MW by 2029, growing at a CAGR of 10.21%. Further, the market is expected to generate colocation revenue of USD 27,921.7 Million in 2024 and is projected to reach USD 50,310.9 Million by 2029, growing at a CAGR of 12.50% during the forecast period (2024-2029).

Tier 3 data center accounted for majority share in terms of volume in 2023, Tier 4 is fastest growing segment

The tier 3 type has a majority of share in the APAC region due to its major advantage. These tiers have high redundancy with multiple paths for power and cooling. Edge and cloud connectivity are expected to increase tier 3 growth.

In Australia, the Smart City Strategy developed by Newcastle Council focuses on how Big Data, the Internet of Things, and cloud connectivity can help create more livable and innovative cities. In the endemic phase of COVID-19, cloud computing was widely acknowledged as the foundation of Malaysia's digital journey. Primary providers such as Alibaba Cloud have enabled small businesses to trade as effectively as large enterprises. This has allowed such businesses to take full advantage of the services.

The APAC tier 3 type operated at an IT load capacity of 6705.97 MW in 2022. The capacity during the forecast period (2023-2029) is expected to grow from 8522.04 MW in 2023 to 13981.5 MW in 2029, registering a CAGR of 8.60%.

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The tier 4 type is expected to have a majority in growth rate of CAGR of 20.40%. Developed countries adopt Tier-4 certification to achieve fault tolerance and redundancy. Tier 4 zones are adopted even in developing regions for this reason. For instance, Supernap Thailand is the only tier 4 facility in the country.

The Tier 1 & 2 segment shows the least growth, as more than 70% of all traffic moves from server to server. Modern applications require significantly more data to travel within a data center at faster speeds and are less forgiving about latency.

China, Australia, and India holds the majority market share in 2023, India is fastest growing country

China and Australia are the major leading countries in the Asia-Pacific region for the data center market. China has the world's largest optical fiber network, 4G and 5G independent networking networks. At present, 916,000 base stations have been built in 5G, accounting for more than 365 million of the world's 70% to 80% of 5G connections. The growing demand for OTT services and streaming content online on high display formats are increasing significant data consumption. China does not have Netflix but has local OTT providers, such as Yuoku, Tencent Video, Mango TV, and Bilibili. The online streaming industry was worth around USD 34 billion in 2021, which is expected to increase with the growing number of users.

In Australia, currently, about 10-12% of data is created and processed outside a centralized data center or cloud, but the number is expected to cross 65-70% by 2025, a global trend that is also reflected in Australia. The COVID-19 crisis highlighted that Australia has a great need for digital infrastructure to improve connectivity. Fiber lines are expected to remain the dominant fixed broadband technology through 2025, supported by the rising demand for high-speed Internet services and the government's focus on aggressive fiber to the x (FTTx) network expansions nationwide under the National Broadband Network (NBN) project. In terms of investment, in August 2022, the Australian operator Telstra selected new transport network infrastructure rollout partners and Mad Max-like machinery capable of laying dual fiber cables simultaneously as the operator accelerates its efforts to build out high-capacity data transport networks across a country renowned for its distinctive environmental challenges.

Asia-Pacific Data Center Market Trends

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Expansion in 5G and rising partnerships among tech companies and universities 5G ICT skills in the region, drives data centers market

Cloud-based applications accessed through smartphones are one of the major growing market trends with smartphone users. Mobile broadband networks cover 96% of Asia-Pacific, with 1.2 billion people accessing mobile internet services. In 2021, smartphone adoption reached 74%. It is expected to rise to 84% by 2025. Mobile subscriber penetration is expected to reach 62% in 2025.

There are 8.9 million mobile apps, and China spends 40%. As of December 2021, China owned 442 apps that achieved a combined penetration rate of 94.6% among mobile internet users. The growing adoption of the 5G network among the population has complemented 5G-enabled device sales. 5G availability, primarily in Southeast Asia, is variable. Countries like Singapore and Indonesia have already seen 5G deployed for some time and continue to innovate use cases for the public and organizations.

By 2022, 5G coverage was expected to reach over 85% of Thailand's population. With new partnerships and development, 5G adoption in smartphones is increasing. For instance, in July 2022, Ericsson and the King Mongkut University of Technology Thonburi (KMUTT) announced that they partnered to support Thai students to build 5G ICT skills for the future. A wireless alternative to wireline broadband connectivity for homes and businesses is one of the major early 5G use cases, particularly in regions with unserved or underserved broadband markets.

Growth in Fiber-to-the-home/building (FTTH/B) service in various countries in APAC drives the demand for data centers in the region

An average broadband internet connection has a minimum download speed of 25 Mbps and a minimum upload speed of 3 Mbps. Fiber-to-the-home/building (FTTH/B) service is set to cement its position as Asia-Pacific's leading fixed broadband technology. Singapore is anticipated to have the highest share of FTTH/B lines as a percentage of total fixed broadband lines in the region, with more than 98% by 2026. Singapore will be followed by Vietnam, Hong Kong, and Malaysia.

According to the Malaysian Minister of Communications and Multimedia, copper

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networks will be phased out by 2023. The government looks to increase broadband coverage in populated areas by at least five-fold, and they look at about 98% broadband coverage in populated areas with a speed of at least 30 Mbps.

The Australian operator Telstra selected new infrastructure rollout partners and Mad Max-like machinery to lay dual fiber cables simultaneously in August 2022. The operator intends to accelerate its efforts to build out high-capacity data transport networks across a country renowned for its distinct environmental challenges to meet increasing demands for data connectivity. Fiber connectivity is driven by the decommissioning of copper networks in Asia-Pacific. Copper is expensive to maintain and difficult to operate. Some estimates suggest that compared to fiber networks, legacy copper network maintenance OpEx is 2-7 times greater, energy costs are 3-6 times higher, and network fault rates are 5-10 times greater.

Asia-Pacific Data Center Industry Overview

The Asia-Pacific Data Center Market is fragmented, with the top five companies occupying 15.58%. The major players in this market are Digital Realty Trust, Inc., Equinix, Inc., KT Corporation, NTT Ltd. and STT GDC Pte Ltd (sorted alphabetically).

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