

Japan Data Center Physical Security - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

<https://marketpublishers.com/r/J17D13C9FAEBEN.html>

Date: July 2024

Pages: 90

Price: US\$ 4,750.00 (Single User License)

ID: J17D13C9FAEBEN

Abstracts

The Japan Data Center Physical Security Market size is estimated at USD 52.51 million in 2024, and is expected to reach USD 116.16 million by 2029, growing at a CAGR of 16.21% during the forecast period (2024-2029).

Security measures can be categorized into four layers, i.e., perimeter security, facility controls, computer room controls, and cabinet controls. The first layer of data center security discourages, detects, and delays any unauthorized entry of personnel at the perimeter. In case of any infringement in the perimeter monitoring, the second layer of defense denies access. It is an access control system utilizing card swipes or biometrics.

The third layer of physical security further restricts access through various verification methods, including monitoring all restricted areas, deploying entry restrictions such as turnstiles, providing biometric access control devices to verify finger and thumbprints, irises, or vascular patterns, providing VCA, and using radio frequency identification. The first three layers ensure the entry of only authorized people. Further security to restrict admission includes cabinet locking mechanisms. This layer addresses the fear of an 'insider threat,' such as a malicious employee.

Key Highlights

Under Construction IT Load Capacity: The upcoming IT load capacity of the Japanese data center physical security market is expected to reach 2,000 MW by 2029.

Under Construction Raised Floor Space: The country's construction of raised floor area

is expected to increase to 10 million sq. ft by 2029.

Planned Racks: The country's total number of racks to be installed is expected to reach 500 K units by 2029. Tokyo is expected to house the maximum number of racks by 2029.

Planned Submarine Cables: There are close to 30 submarine cable systems connecting the Philippines, and many are under construction. One such submarine cable that is estimated to start service in 2023 was the Southeast Asia-Japan Cable 2 (SJC2), which stretches over 10,500 kilometers with landing points from Chikura, Japan, to Shima, Japan.

Japan Data Center Physical Security Market Trends

The Video Surveillance Segment Holds Significant Share

Sensitive and important data are stored in data centers, so security is a top priority. Data center operators use video surveillance systems to ensure that security standards and regulations are met. This allows one to monitor access, detect unauthorized access, and maintain compliance.

Data protection laws set strict requirements for data center operators. Video surveillance can help maintain compliance by improving physical security measures.

In 2021, the smartphone penetration rate in Japanese households was nearly 89%. In recent years, the average amount of time people spend using mobile internet has increased, creating business opportunities for related industries such as e-commerce. With the advent of online shopping platforms, small and medium-sized businesses are also switching to online payment methods and a digital presence in the world of e-commerce. Even large, well-established companies are integrating e-commerce platforms with traditional forms of business. This leads to an increase in data traffic and, thus, an increase in data centers and, in turn, an increase in the demand for video surveillance. This helps prevent malicious or erroneous operations in the user's data center and provides evidence to identify those responsible in the event of an incident.

Internet users in Japan increased by 844 thousand (+0.7%) between 2021 and 2022. Internet traffic increased 1.6x in 2020 compared to pre-COVID-19 levels in 2019 as the pandemic led to a surge in home video conferencing, distance learning, and video streaming. In addition, the increased use of connected devices and smart homes

increased the demand for digital data and improved network traffic. This makes the country one of the pioneers of mobile commerce in the region. This means an increase in data consumption across data centers, thereby boosting the data center physical security market.

Since the beginning of 2021, Japanese mobile phone companies have been accelerating the rollout of 5G. The Ministry of International Communications wanted to advance Japan's 5G experience further. The goal was to achieve 98% 5G population coverage by the end of March 2024. Overall, Japan wants to increase the number of frequencies available for its 5G services. The growth of the telecommunications industry is increasing the size of data centers, thereby increasing the need for video surveillance. Video surveillance has a powerful deterrent effect, reducing the likelihood of physical attacks and unauthorized access to critical data.

The IT and Telecommunication Segment Holds the Major Share

Japan is home to major ICT organizations such as Sony, Panasonic, Fujitsu, NEC, and Toshiba, which continue to play a key role in the country's expansion as a major center for ICT. In addition, the orderly development of numerous modernization and expansion projects in the country, along with increasing government spending on maintaining high-quality and advanced infrastructure, are also driving the growth of the market.

The Japanese government is making efforts to accelerate the digital transformation of the private sector and support emerging SMEs. In 2021, the Japanese government, led by the Ministry of Economy, Trade and Industry and the Ministry of Internal Affairs and Communications, published guidelines for promoting digital transformation within organizations, especially targeting small and medium-sized enterprises. Similarly, guidelines on implementing AI, cybersecurity, and secure cloud services were also published in the same year.

The government is continuing to push the rollout of 5G and other cutting-edge technologies capable of transferring data at even higher rates than currently possible with long-term evolution (LTE). NTT DOCOMO, KDDI, Softbank, and Rakuten Mobile were each allocated a 5G spectrum by the Ministry of Internal Affairs and Communication (MIC) in April 2019. These four mobile service providers launched 5G telecommunication services in 2020. This scenario may increase the consumption of data and use of data centers, thereby driving the growth of the market studied.

The Government of Japan's Digital Agency promotes the utilization of cloud services for both central and local government offices. For instance, the Digital Agency announced in October 2022 that the government agencies would adopt "Government Cloud" services for the fiscal year.

The Ministry of Economics, Trade and Industry (METI) provided an IT Adoption Subsidy to organizations investing in IT, including cloud services, from FY 2017. In 2021, the Ministry of Health, Labour and Welfare (MHLW) provided organizations affected by the COVID-19 pandemic with a "Workstyle Reform Promotion" subsidy to help them transition to remote work. MHLW supports SMEs to cover the contracting fees and equipment costs of cloud services and other IT devices.

Japan Data Center Physical Security Industry Overview

The market is highly fragmented due to players like Axis Communications AB, ABB Ltd, and Bosch Sicherheitssysteme GmbH, which play a vital role in upscaling the capabilities of enterprises. Market orientation leads to a highly competitive environment. The biggest retail and wholesale data center market companies are trying to make their system secure and safe from thefts. There has been a wave of consolidation in the market as smaller players seek to scale up their production to compete, and big companies are focusing on product innovation and launches to maintain their market position. For instance,

In April 2023, Schneider Electric launched a new service offer, EcoCare for Modular Data Centers. Members of this innovative service plan benefit from specialized expertise to maximize modular data centers' uptime with 24/7 proactive remote monitoring and condition-based maintenance. Members benefit from exclusive support, which includes a dedicated customer success management team, who become their go-to coach, orchestrating remote and on-site services teams and addressing infrastructure and maintenance needs at a system level, rather than a fragmented approach for each asset only when problems arise.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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