

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

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Abstracts

The Malaysia Data Center Market size is estimated at 0.71 thousand MW in 2024, and is expected to reach 1.36 thousand MW by 2029, growing at a CAGR of 13.73%. Further, the market is expected to generate colocation revenue of USD 838 Million in 2024 and is projected to reach USD 2,038.2 Million by 2029, growing at a CAGR of 19.45% during the forecast period (2024-2029).

Tier 3 data centers accounts for majority market share in 2023, it is the fastest growing in forecasted period

The tier 1 & 2 segment of the Malaysian data center market reached an IT load capacity of 0.59 MW in 2021 and then grew to 2.39 MW in 2022. The capacity is expected to reach 3.59 MW by 2029, recording a CAGR of 5.99%. However, the tier 3 segment recorded an IT load capacity of 257.85 MW in 2021. The capacity is anticipated to grow from 457.66 MW in 2022 to 1,379.11 MW by 2029, registering a CAGR of 17.07%. The tier 3 segment has a higher growth rate than all other tiers.

A tier 3 data center is concurrently maintainable, allowing for any planned maintenance activity of power and cooling systems to take place without disrupting the operations of computer hardware located in the data center. Most telecom operators are focusing on establishing tier 3 facilities in the country as they prevent uneven disturbances. The development of digital infrastructure, such as data centers, is central to enabling 5G applications. Various investors are also signing agreements to launch 5G services in the country. For instance, in November 2022, Malaysian telcos Celcom and DiGi approved

a merger agreement. Once the two companies are fully merged, the new entity will be one of the largest carriers in Malaysia, with over 20 million subscribers.

The tier 4 data center segment is expected to remain stagnant in the near future but will see increased opportunities over the coming years. Currently, TelcoHubeXchange and Regal Orion Sdn Bhd are the only companies with Tier 4 certified facilities in Malaysia.

Malaysia Data Center Market Trends

Growth in digital consumers boost the data center demand in country

The total number of smartphone users in the country was 29.46 million in 2022. This is expected to witness a CAGR of 1.43% during the forecast period, reaching 32.54 million by 2029.

According to Google's research findings regarding mobile searches in Malaysia, a share as high as 52% of the population use mobile phones to search, 36% use their computers or laptops, and 12% use tablets. Thus, a staggering 64% of the searches performed in Malaysia are through mobile devices. Due to the COVID-19 pandemic and the strict enforcement of MCO, which included remaining indoors at all times, internet traffic in Malaysia recorded a 23% increase in the first week of March 2020. While the second week saw an 8.6% increase, complaints of slow internet speeds also began emerging. This could be due to the growing number of active internet users.

Malaysia added three million new digital consumers between the pandemic's start in 2020 and the first quarter of 2021. Considering that 55.9% of e-commerce transactions in Malaysia are completed on a mobile device, the growing smartphone penetration means more people will opt to shop online over the coming years, according to the Digital 2022-Malaysia report.

Expansion of 5G and rising mergers between companies such as Malaysian telcos Celcom and DiGi increase data center facilities in Malaysia

Major telecommunication operators in Malaysia include Celcom, Digi, Maxis, U Mobile, Telekom Malaysia, and Time dotCom. In terms of actual geographical mobile network

coverage in Malaysia, Celcom is ranked first, with 9.2 out of 10 points, followed by Digi and Maxis, which have 8.6 points each, followed by U Mobile with 7.7 points and Unifi with 7.0 points.

Ericsson is at the forefront of 5G services in Malaysia, where it is working closely with Digital Nasional Berhad to deliver a world-class 5G network for Malaysia. 5G will serve as the catalyst for Malaysia's digital transformation and provide the platform for IR4.0. Currently, the government has identified 700MHz, 3.5GHz, and 26/28GHz as the pioneer spectrum bands for the roll-out of 5G in Malaysia.

Malaysian telcos Celcom and DiGi have also approved a merger agreement. Once the two companies are fully merged, the new entity will be the largest carrier in Malaysia, with over 20 million subscribers. The company also said that the implementation of 5G technology would have a positive impact of MYR 150 billion on the country's GDP and create 750,000 jobs.

Malaysia Data Center Industry Overview

The Malaysia Data Center Market is fragmented, with the top five companies occupying 34.57%. The major players in this market are Bridge Data Center (Chindata Group), Keppel DC REIT Management Pte. Ltd, NTT Ltd, VADS BERHAD (TM One) and YTL Data Center Holdings Pte Ltd (YTL Power International Berhad) (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

Contents

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 MARKET OUTLOOK

4.1 It Load Capacity

4.2 Raised Floor Space

4.3 Colocation Revenue

4.4 Installed Racks

4.5 Rack Space Utilization

4.6 Submarine Cable

5 KEY INDUSTRY TRENDS

5.1 Smartphone Users

5.2 Data Traffic Per Smartphone

5.3 Mobile Data Speed

5.4 Broadband Data Speed

5.5 Fiber Connectivity Network

5.6 Regulatory Framework

5.6.1 Malaysia

5.7 Value Chain & Distribution Channel Analysis

6 MARKET SEGMENTATION (INCLUDES MARKET SIZE IN VOLUME, FORECASTS UP TO 2029 AND ANALYSIS OF GROWTH PROSPECTS)

6.1 Hotspot

6.1.1 Cyberjaya-Kuala Lumpur

6.1.2 Rest of Malaysia

6.2 Data Center Size

- 6.2.1 Large
- 6.2.2 Massive
- 6.2.3 Medium
- 6.2.4 Mega
- 6.2.5 Small
- 6.3 Tier Type
 - 6.3.1 Tier 1 and
 - 6.3.2 Tier
 - 6.3.3 Tier
- 6.4 Absorption
 - 6.4.1 Non-Utilized
 - 6.4.2 Utilized
 - 6.4.2.1 By Colocation Type
 - 6.4.2.1.1 Hyperscale
 - 6.4.2.1.2 Retail
 - 6.4.2.1.3 Wholesale
 - 6.4.2.2 By End User
 - 6.4.2.2.1 BFSI
 - 6.4.2.2.2 Cloud
 - 6.4.2.2.3 E-Commerce
 - 6.4.2.2.4 Government
 - 6.4.2.2.5 Manufacturing
 - 6.4.2.2.6 Media & Entertainment
 - 6.4.2.2.7 Telecom
 - 6.4.2.2.8 Other End User

7 COMPETITIVE LANDSCAPE

- 7.1 Market Share Analysis
- 7.2 Company Landscape
- 7.3 Company Profiles (includes Global Level Overview, Market Level Overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and Analysis of Recent Developments).
 - 7.3.1 AIMS DATA CENTRE SDN BHD
 - 7.3.2 Bridge Data Center (Chindata Group)
 - 7.3.3 Csf Group
 - 7.3.4 HDC Data Centre SDN BHD (HDC)
 - 7.3.5 IPServerOne
 - 7.3.6 Keppel DC REIT Management Pte. Ltd

7.3.7 NTT Ltd

7.3.8 Open DC SDN BHD

7.3.9 TelcoHubeXchange

7.3.10 VADS BERHAD (TM One)

7.3.11 YTL Data Center Holdings Pte Ltd (YTL Power International Berhad)

7.3.12 Zenlayer Inc.

7.4 LIST OF COMPANIES STUDIED

8 KEY STRATEGIC QUESTIONS FOR DATA CENTER CEOS

9 APPENDIX

9.1 Global Overview

9.1.1 Overview

9.1.2 Porter's Five Forces Framework

9.1.3 Global Value Chain Analysis

9.1.4 Global Market Size and DROs

9.2 Sources & References

9.3 List of Tables & Figures

9.4 Primary Insights

9.5 Data Pack

9.6 Glossary of Terms

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