

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

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Abstracts

The Malaysia Data Center Physical Security Market size is estimated at USD 31.34 million in 2024, and is expected to reach USD 72.63 million by 2029, growing at a CAGR of 18.30% 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 Malaysian data center market is expected to reach 1,300 MW by 2029.

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

is expected to increase by more than 7.5 million sq. ft by 2029.

Planned Racks: The country's total number of racks to be installed is expected to reach 380 K units by 2029. Cyberjaya-Kuala Lumpur is expected to house the maximum number of racks by 2029.

Planned Submarine Cables: There are close to 25 submarine cable systems connecting Malaysia, and many are under construction. One such submarine cable that is estimated to start service in 2025 is SeaMeWe-6, which stretches over 19,200 kilometers with landing points from Morib, Malaysia.

Malaysia Data Center Physical Security Market Trends

The Video Surveillance Segment to Hold 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.

Video surveillance allows users to monitor all ongoing issues and events within the data center in real-time, allowing them to provide up-to-date information to their customers anytime and anywhere.

Malaysia added 3 million new digital consumers from the start of the pandemic to the first quarter of 2021. Considering that 55.9% of e-commerce transactions in Malaysia are done through mobile devices, the increasing penetration of smartphones means that more people will choose to shop online in the coming years. It means that. With the advent of online shopping platforms, small and medium-sized businesses are also switching to online payment methods and to have 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 a data center and provides evidence to identify those responsible in the event of an incident.

Approximately 86% of Malaysia's population were active social media users in 2021. This is a 24% increase compared to 2016, when social media users accounted for about 62% of Malaysia's total population. In the first quarter of 2021, an average mobile

internet user in Malaysia consumed approximately 25.7 GB of data. The high usage can be explained by the fact that most providers gave their users 1 GB for free during the pandemic. Additionally, the increased use of connected devices and smart homes has increased the demand for digital data and 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 and, in turn, growth in the market studied.

IT and Telecommunication Segment Holds the Major Share

Malaysia is becoming a regional hub for many businesses, which is driving more organizations to invest in cloud systems. This, in turn, may drive the need for more local data centers. The new government hybrid cloud service, called MyGovCloud, will be a combination of both private cloud services from PDSA and public cloud from a cloud service provider (CSP).

According to the SME Corporation of Malaysia (SME Corp. Malaysia), the central coordinating agency under the Ministry of Entrepreneur Development and Cooperatives (MECAD), the country's MSMEs (micro, small, and medium businesses) formed the backbone of the economy, representing 97.4% of overall business establishments in 2021. In the endemic phase of COVID-19, cloud computing was widely acknowledged as the foundation of the digital journey. This enables more data consumption, necessitating data center growth and thereby increasing the need for data center security in the country.

With the 5G technology, the consumption rate is expected to increase, along with the need for effective data storage facilities in the industry. The development of digital infrastructures, such as data centers, is central to enabling 5G applications.

The demand for data centers is experiencing rapid growth, driven primarily by the telecom sector's need to deliver content, mobile, and cloud services. Ensuring the continued operation of these facilities is crucial. Interconnecting data centers and providing WAN connectivity are vital to network requirements, resulting in high data consumption, necessitating data center growth and thereby increasing the need for data center security in the country.

Moreover, rising smartphone users coupled with discounted internet services and the increasing data traffic per smartphone drive the demand for telecom services, creating

more need for data storage space and leading to rising demand for data centers in the region, thereby increasing the need for data center security in the country.

Malaysia Data Center Physical Security Industry Overview

The Malaysian data center physical security market is highly fragmented. This is due to players like Axis Communications AB, ABB Ltd, and Bosch Sicherheitssysteme GmbH, who 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 secondary markets as smaller players seek to scale to compete and big players scale their products in the market. 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. It addresses 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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