

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

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Abstracts

The Singapore Data Center Market size is estimated at 0.88 thousand MW in 2024, and is expected to reach 1.02 thousand MW by 2029, growing at a CAGR of 2.89%. Further, the market is expected to generate colocation revenue of USD 4,036.2 Million in 2024 and is projected to reach USD 7,748.8 Million by 2029, growing at a CAGR of 13.93% during the forecast period (2024-2029).

Tier 3 holds the majority market share in 2023, Tier 4 is the fastest growing data center

The tier 3 and 4 segments are expected to hold the highest market share during the forecast period. The tier 3 segment is expected to hold the highest market share of 71.5% in 2023. However, its share may decrease marginally to 61.4% in 2029 due to the upcoming tier 4 data centers.

The tier 3 segment is expected to record a CAGR of 0.43% during the forecast period, majorly due to the upcoming data centers from Keppel Data Center and STT GDC Pte Ltd, which plan to launch three facilities with a cumulative IT load capacity of 90 MW.

The tier 1 & 2 segment is expected to record a CAGR of 1.88% during the forecast period, with a market share of 12.1% by 2029. The growth trend is majorly due to the upcoming data centers from NTT Ltd, which plans to launch one facility with an IT load capacity of 5 MW.

Both the tier 1 & 2 and tier 3 segments may witness a dip in their market share due to

the growth of the tier 4 segment, with a CAGR of 12.69% and an IT load capacity of 269.65 MW during the forecast period.

In Singapore, 7% of total electricity consumption goes to data centers, which may grow to more than 12% by 2030. As a result, the country aims to efficiently use data centers by equipping them with modern infrastructure and cooling techniques. Operators are considering investing in more efficient cooling solutions, such as district cooling, and greener options for powering data centers, such as engaging in Power Purchase Agreements (PPAs). Tier 4-certified facilities may help operators achieve these standards, thus boosting the segment's growth.

Singapore Data Center Market Trends

Growing application of connected devices and smart homes to boost the market demand

The country has a smaller population compared to other Southeast Asian countries, owing to which the number of smartphone users is comparatively lesser than the rest.

The country is expected to grow significantly and reach 6.21 million users by 2029, from 5.4 million users in 2022.

According to Hootsuite, the country has a 100% urbanized population with 8.7 million cellular mobile connections, accounting for 147% of the population. This data suggests that each citizen in the country owns more than one cellular device. The growing application of connected devices and smart homes also boosted the demand for digital data and increased network traffic. Such factors are anticipated to increase the number of smartphone users in the country.

Singtel's expanding 5G network in partnership with Ericsson boost the data center demand

Singapore was one of the early adopters of the 5G network in 2020, while the presence of 2G was decommissioned as early as 2016. As of 2022, 4G dominated the market with 49.7 Mbps, while its speed is expected to reach 54.75 Mbps by 2029.

The country's 5G network is booming and is expected to reach 946.04 Mbps by 2029. 5G networks and services are expected to form the backbone of growth in the telecom sector over the coming years as service providers seek new ways to engage customers in a market that is otherwise already saturated.

Singtel is ramping up its 5G standalone (SA) deployment in Singapore by expanding the network and developing new 5G use cases in partnership with Ericsson. In a press release, the Swedish vendor stated its plans to power Singtel's 5G SA network with 5G radio access products and cloud-native dual-mode 5G Core network solutions. In September 2021, Singtel confirmed that its 5G network covers over two-thirds of Singapore. New 5G sites were added in densely populated areas like Choa Chu Kang, Punggol, Sembawang, and Tampines.

Singapore Data Center Industry Overview

The Singapore Data Center Market is fragmented, with the top five companies occupying 29.81%. The major players in this market are China Mobile International Ltd, Cxtera Technologies, Digital Realty Trust Inc., Equinix Inc. and Rackspace Technology Inc. (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format

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