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

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Abstracts

The Thailand Data Center Market size is estimated at 200.1 MW in 2024, and is expected to reach 269.9 MW by 2029, growing at a CAGR of 6.17%. Further, the market is expected to generate colocation revenue of USD 277.1 Million in 2024 and is projected to reach USD 308.4 Million by 2029, growing at a CAGR of 2.16% during the forecast period (2024-2029).

Tier 3 DC facilities dominates the market share in the region and is expected to dominate in coming years

The country has no facility certified with Tier 1 and Tier 2. The tier 3 data center segment reached an IT load capacity of 71.48 MW in 2021. The capacity is anticipated to grow from 74.33 MW in 2022 to 199.55 MW by 2029 at a CAGR of 15.15%. The tier 4 data center segment reached an IT load capacity of 20 MW in 2021. The capacity is anticipated to grow from 20 MW in 2022 to 50 MW by 2029 at a CAGR of 13.99%.

In most Thai facilities, IT components can be replaced or removed without interrupting routine data center operations, so most facilities are Tier 3 certified.

Currently, only one facility in Thailand has Tier 4 certification, i.e., SUPERNAP Thailand. It has a high fault-tolerant facility, which is ideal for consistently high traffic levels. National Telecom (NT), TOT, and SUPERNAP (Thailand) signed an MOU supporting governmental digital modernization, which is called the Data Center and Cloud Services Partnership Program.

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Thailand Data Center Market Trends

Increasing number of digital consumers boost the data center demand in country

The total number of smartphone users in the country was 57 million in 2022, which is expected to increase and register a CAGR of 0.83% during the forecast period to reach 60.2 million by 2029.

Thailand shows a strong level of digital readiness with a high penetration rate for internet usage, social media engagement, mobile connections, online shopping, and digital payments, according to the "Digital 2022: Thailand." An increase in domestic e-commerce merchants also promotes sales growth. Cross-border spending is half (50%) of Thailand's total e-commerce spend. The Thai mobile commerce market is already the dominant e-commerce sales channel in the country, used for 52% of all online shopping transactions and worth USD 13.6 billion. This makes the country one of the regional forerunners for mobile commerce.

Thailand was expected to end 2022 with a 5G coverage of over 85% of the country's population. With newer partnerships and development, the usage of 5G in smartphones is increasing. For instance, in July 2022, Ericsson and the King Mongkut University of Technology Thonburi (KMUTT) announced a partnership to support Thai students in building 5G ICT skills for the future. As the pioneer in launching 5G commercial service in Southeast Asia, Thailand is well positioned to develop its ambitious Industry 4.0 wireless ecosystem to enhance the consumer mobile experience and support the digitization of its manufacturing, energy, and healthcare industries.

The increasing investments for the expansion of 5G network by Operators drives the growth of the market

Thailand has one of the highest penetration rates of 5G in the ASEAN region, with 9.2%, only behind Singapore, with 13.9%. Thailand's 5G subscriptions are expected to reach 70 million by 2027, or 73% of the total subscriptions in mobile services, according to Digital Economy and Society (DES).

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Thailand was one of the first markets to launch 5G in the Asia-Pacific region, with AIS and TrueMove H both launching commercial 5G services during Q1 2020. Driving 5G adoption in the market is one of the primary objectives for AIS and TrueMove H, and each had targeted 2 million 5G connections by the end of 2021. In 2021, users saw the fastest average overall and 5G download speeds on AIS' network. The operator won overall Download Speed Experience with a score of 19.4 Mbps, 1.7 Mbps (9.7%) ahead of second-placed TrueMove H. AIS also won the 5G Download Speed Experience award, clocking in at 180.3 Mbps and commanding a major lead of 57.4 Mbps (46.7%) over the runner-up TrueMove H. DTAC lagged behind its rivals.

OpenGov Asia recently reported that the Thai Ministry of Digital Economy and Society (MDES), Digital Economy Promotion Agency (DEPA), and a Chinese multinational technology company announced the launch of the Thailand 5G Ecosystem Innovation Center (5G EIC) in Bangkok. This launch aims to accelerate 5G innovation through ecosystem collaboration and boost the digital economy. The rise of data centers in the nation is facilitated by the rising mobile internet speeds, which directly impacts data traffic and raises the demand for more racks.

Thailand Data Center Industry Overview

The Thailand Data Center Market is moderately consolidated, with the top five companies occupying 40.98%. The major players in this market are CS LOXINFO PUBLIC COMPANY LIMITED, NTT Ltd, STT GDC Pte Ltd, True Internet Data Center Co. Ltd and United Information Highway Co. Ltd (sorted alphabetically).

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