

The Asia-Pacific Data Centre Landscape 2022 to 2026

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Abstracts

The Data Centre markets in the Asia Pacific Region report analyses twelve third-party Data Centre country markets in the region including Australia, China, Hong Kong, Indonesia, Japan, Korea (South), Malaysia, New Zealand, Philippines, Singapore, Thailand and Vietnam.

The Data Centres providers in Asia Pacific region is amongst the fastest growing in the world, with South Korea forecast with a growth of 100%.

The report looks at the Data Centre developments in the region, including the key metrics of market size, growth, pricing and new investment.

The report also provides a forecast for each of the twelve surveyed countries for the period end of December 2022 to end of December 2026 covering:

Data Centre space in m² - 2022 to 2026

Data Centre Power in MW - 2022 to 2026

Data Centre utilisation level - 2022 to 2026

Average rack space, m² & kw pricing - 2022 to 2026

Data Centre Revenues Forecast - 2022 to 2026

Some of the key findings include:

Data Centre growth rates in the Asia-Pacific region remains strong. The average rate of

growth in Data Centre space, power and revenue forecast for the four-year period to the end of 2026 is to be 50 per cent, with South Korea to have a growth rate of over 100 per cent for the same period – with Australia and Singapore to have among the lowest growth rates. Australia and Singapore are both mature markets with over 400,000 m² of installed Data Centre space, and have attracted a range of hyperscale and cloud investments. Singapore is constrained by a shortage of power and land for Data Centre development with power being rationed by the Government.

New Data Centres are mostly being built in Metro city areas: The Metro city area is attractive as it is close to large population centres – with around half of the Data Centre power in the 12 Asia Pacific country markets being located in 17 Data Centre city clusters.

The existing Data Centre locations (particularly Singapore & Hong Kong) face challenges: Singapore and Hong Kong both face power constraints, with most power being imported with limited renewable power capacity. The constraints on developments in Singapore & Hong Kong provides an opportunity for other markets:

The Australian Data Centre market has become one of the largest in Asia: Australia has benefitted from the creation of large campus Data Centres in the Melbourne and Sydney areas, with AirTrunk (Melbourne) developing three campuses with up to 370 MW of power in total and NEXT DC (Melbourne) also developing two campuses with up to 120 MW of power.

The Asia Pacific market is being powered by demand for the cloud: Cloud expansion is underpinning the business case for Data Centre construction leading to demand for new hyperscale facilities. The entry of new investors including private equity investors and Data Centre Providers is spurring development in new hyperscale facilities.

There is some uncertainty about future Data Centre pricing and the revenue outlook: Overall Datacentre pricing forecasts that Asia Pacific Data Centre pricing will continue to rise despite the increase in new space and facilities taking place.

Geographical coverage

Australia

China

Hong Kong

Indonesia

Japan

South Korea

Malaysia

New Zealand

Philippines

Singapore

Thailand

Vietnam

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