

Asia Pacific Hyperscale Data Center Market Report (2021-2031) by Scope, Segmentation, Dynamics, and Competitive Analysis

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Abstracts

The Asia Pacific hyperscale data center market was valued at approximately USD 12.45 billion in 2023 and is projected to grow to around USD 61.57 billion by 2031, reflecting a compound annual growth rate (CAGR) of 22.1% during this period.

Growing Demand for Sustainable Hyperscale Data Centers

As digital transformation accelerates, the need for enhanced data processing capabilities is increasing, which raises concerns about balancing technological advancements with environmental sustainability. Companies face mounting pressure to adopt sustainable practices due to stricter environmental regulations, heightened investor interest in green initiatives, and consumer preferences for eco-friendly products. Additionally, government policies are increasingly aimed at fostering sustainable data center operations. For example, the United Nations has outlined a strategy to limit global temperature rise and achieve net-zero emissions by 2050, urging nations to establish standards to curb greenhouse gas emissions. This initiative encourages the transition to renewable energy sources like solar and wind, moving away from fossil fuels. Furthermore, the 2023 United Nations Climate Change Conference introduced the Global Cooling Pledge, which aims to cut cooling-related emissions by 68% by 2050, enhancing cooling efficiency and promoting natural refrigerants. These sustainability efforts are expected to drive new trends in the hyperscale data center market, facilitating environmentally responsible cloud operations that contribute to achieving net-zero emissions goals.

Overview of the Asia Pacific Hyperscale Data Center Market

The Asia Pacific region is poised for significant growth in the hyperscale data center market, driven by increasing internet penetration and the rapid rollout of 5G infrastructure. According to the GSM Association, the region is anticipated to have over 400 million 5G subscriptions by 2025, accounting for 14% of total mobile subscriptions. While 4G technology will continue to play a significant role, countries like China and South Korea are quickly adopting 5G technology. Telecom operator revenues in the region are expected to rise from USD 210 billion in 2021 to USD 224 billion by 2025. The 5G network offers high bandwidths (frequencies above 24 GHz) that support ultra-high capacity and low-latency applications, further driving the adoption of edge computing, which is becoming a key trend in the hyperscale data center market.

The e-commerce sector has also experienced rapid growth, particularly during the pandemic, with Asia Pacific emerging as a leader in this market. The increasing middle-class population and a growing base of mobile internet users have significantly contributed to the expansion of e-commerce across the region. China, in particular, dominates the global e-commerce landscape, accounting for a substantial share of worldwide transactions. Other countries in the region, such as Australia and India, are also witnessing impressive growth in their e-commerce markets, with projections indicating that Australia's e-commerce market will reach USD 32.3 billion by 2024 and India's market will hit USD 188 billion by 2025. The establishment of 5G networks and the booming e-commerce industry are expected to generate vast amounts of data, thereby increasing the demand for hyperscale data centers in Asia Pacific.

Market Segmentation Analysis

The Asia Pacific hyperscale data center market is segmented by solutions, end users, industry verticals, and countries:

Solutions: The market is divided into storage, networking, servers, security, and others, with the storage segment holding the largest market share in 2023.

End Users: The market is categorized into colocation providers, enterprises, and cloud providers, with colocation providers leading in market share in 2023.

Industry Verticals: The market is segmented into BFSI (Banking, Financial Services, and Insurance), telecom and IT, government and public sectors, media and entertainment, and others, with BFSI holding the largest share in 2023.

Countries: The market is divided into Australia, China, India, Japan, South Korea, and the Rest of Asia Pacific, with the Rest of Asia Pacific dominating the market share in 2023.

Key Players in the Market

Prominent companies in the Asia Pacific hyperscale data center market include ABB Ltd, Dell Technologies Inc, EdgeConnex Inc, Cisco Systems Inc, IBM Corp, Fujitsu Ltd, Hewlett Packard Enterprise, Intel Corp, Juniper Networks Inc, and Schneider Electric SE. These companies are at the forefront of providing innovative solutions and services in the hyperscale data center sector.

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