

South Korea Data Center Market - Investment Analysis and Growth Opportunities 2022-2027

Market Report | 2022-06-20 | 109 pages | Arizton Advisory & Intelligence

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Report description:

South Korea data center market is expected to grow at a CAGR of 6.71% from 2022 to 2027.

KEY HIGHLIGHTS OF THE REPORT

- South Korea data center market is one of the rapidly growing markets in the APAC region with strong economic factors, government support, digitalization, technology penetration, and growing connectivity with major markets across the globe.
- The government of South Korea is supporting digitalization in the country with initiatives such as Digital New Deal 2.0, the National Project of Bio Big Data, and investments in artificial intelligence are driving factors for the industry growth.
- The adoption of renewable energy is gaining traction in the industry driven by government initiatives such as the Government's Green New Deal, which aims at increasing the share of renewable energy in the energy mix to 20% by 2030.
- Cloud service providers are significantly increasing their presence in South Korea. Global cloud service providers such as Alibaba, Microsoft, Oracle, AWS, and Google have their cloud regions in the country. For instance, in May 2022, AWS announced the availability of its wavelength zone in Seoul based on SK Telecom's network.
- Global data center operators have also invested in collaboration with other firms in the country. For instance, global colocation data center operator Equinix has formed a joint venture with GIC to develop data centers in the country and is currently developing two data centers in Seoul.
- The market has also planned developments of data centers by new entrants such as Princeton Digital Group and Pure Data Centres Group. For instance, Pure Data Centres Group had announced a partnership with LOGOS, an Industrial infrastructure development firm, in December 2021 for expansion in the APAC region, including South Korea.

SOUTH KOREA DATA CENTER MARKET OUTLOOK

- Seoul is the country's major location for data center developments, followed by emerging locations such as Anyang, Hanam, Goyang, Gwangju, Busan, Seongnam, Gimhae, Daegu, Cheongju, Guro, Yongin, Sejong, and Gunsan.
- South Korea's government has also established several free economic zones such as Incheon FEZ, Busan-Jinhae FEZ, Gwangyang

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Bay Area FEZ, and Yellow Sea FEZ that will offer space for industrial development with benefits such as tax exemptions.

-□Government steps such as the personal data protection law named Personal Information Protection Act (PIPA) and the establishment of the Korea Data Center Council have strengthened the South Korean data center market.

-□Significant deployment of 5G services and the establishment of smart cities in South Korea will fuel the data traffic and further grow the demand for more data centers in the country.

WHY SHOULD YOU BUY THIS RESEARCH REPORT?

-□Market size available in the investment, area, power capacity, and the South Korea colocation market revenue.

-□An assessment of the data center investment in South Korea by colocation, hyperscale, and enterprise operators.

-□Data center investments in the area (square feet) and power capacity (MW) across cities in the country.

-□A detailed study of the existing South Korea data center market landscape, an in-depth industry analysis, and insightful predictions about the South Korea data center market size during the forecast period.

-□Snapshot of existing and upcoming third-party data center facilities in South Korea

o□Facilities Covered (Existing): 34

o□Facilities Identified (Upcoming): 13

o□Coverage: 13 Cities

o□Existing vs. Upcoming (Data Center Area)

o□Existing vs. Upcoming (IT Load Capacity)

-□Data center colocation market in South Korea

o□Market Revenue & Forecast (2021-2027)

o□Retail and Wholesale Colocation Pricing

o□Retail vs. Wholesale Colocation Market

-□The South Korea data center landscape market investments are classified into IT, power, cooling, and general construction services with sizing and forecast.

-□A comprehensive analysis of the latest trends, growth rate, potential opportunities, growth restraints, and prospects for the industry.

-□Business overview and product offerings of prominent IT infrastructure providers, construction contractors, support infrastructure providers, and investors in the industry.

-□A transparent research methodology and the analysis of the demand and supply aspect of the market.

VENDOR LANDSCAPE

-□South Korea data center market has the presence of several local and global vendors operating across different segments. Some major support infrastructure vendors operating in the industry include AB, Caterpillar, Cummins, Eaton, Fuji Electric, Legrand, Rittal, Schneider Electric, STULZ, and Vertiv.

-□The South Korea data center market is dominated by local construction contractors, including GS E&C, Hyundai Engineering & Construction, POSCO ICT, and Samsung C&T. For instance, Samsung C&T has provided services for the construction of IGIS Asset Management's data center in Hanam.

-□In terms of IT infrastructure, the industry is dominated by global vendors such as Arista Networks, Atos, Cisco Systems, Dell Technologies, Fujitsu, Hewlett Packard Enterprise, IBM, and Lenovo. For instance, Cisco Systems provided its Catalyst 9000 series switches to pharmaceutical company Kolmar Korea for network expansion.

IT Infrastructure Providers

-□Arista Networks

-□Atos

-□Cisco Systems

-□Dell Technologies

-□Fujitsu

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- Hewlett Packard Enterprise (HPE)
- IBM
- Inspur
- Intel
- Lenovo
- NetApp

Data Center Construction Contractors & Sub-Contractors

- BEHIVE
- DPR Construction
- GS E&C
- HanmiGlobal
- Hyundai Engineering & Construction
- ISG
- POSCO ICT
- SAMOO Architects & Engineers
- Samsung C&T

Support Infrastructure Providers

- ABB
- Caterpillar
- Cummins
- Delta Electronics
- Eaton
- Fuji Electric
- Legrand
- Mitsubishi Electric
- Piller Power Systems
- Rittal
- Rolls-Royce
- Schneider Electric
- STULZ
- Vertiv

Data Center Investors

- Actis
- Digital Realty
- Dreammark1
- Equinix
- Kakao Corp
- KT Corp
- LG Uplus
- NAVER Corp
- NHN Corp
- Princeton Digital Group (PDG)
- Pure Data Centres
- Samsung SDS

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- []SC Zeus Data Centers
- []SK Broadband
- []ST Telemedia Global Data Centres

EXISTING VS. UPCOMING DATA CENTERS

- []Existing Facilities in the region(Area and Power Capacity)
 - o[]Seoul
 - o[]Other Cities
- []List of Upcoming Facilities in the region(Area and Power Capacity)

REPORT COVERAGE:

This report analyses the South Korea data center market share. It elaboratively analyses the existing and upcoming facilities and investments in IT, electrical, mechanical infrastructure, general construction, and tier standards. It discusses industry sizing and investment estimation for different segments. The segmentation includes:

- []IT Infrastructure
 - o[]Servers
 - o[]Storage Systems
 - o[]Network Infrastructure
- []Electrical Infrastructure
 - o[]UPS Systems
 - o[]Generators
 - o[]Switches & Switchgears
 - o[]PDUs
 - o[]Other Electrical Infrastructure
- []Mechanical Infrastructure
 - o[]Cooling Systems
 - o[]Rack Cabinets
 - o[]Other Mechanical Infrastructure
- []Cooling Systems
 - o[]CRAC & CRAH Units
 - o[]Chiller Units
 - o[]Cooling Towers, Condensers & Dry Coolers
 - o[]Economizers & Evaporative Coolers
 - o[]Other Cooling Units
- []General Construction
 - o[]Core & Shell Development
 - o[]Installation & commissioning Services
 - o[]Engineering & Building Design
 - o[]Fire Detection & Suppression Systems
 - o[]Physical Security
 - o[]Data Center Infrastructure Management (DCIM)
- []Tier Standard
 - o[]Tier I & Tier II
 - o[]Tier III

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- o Tier IV
- Geography
- o Seoul
- o Other Cities

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