

Thailand Data Center Market - Investment Analysis and Growth Opportunities 2022-2027

Market Report | 2022-06-20 | 99 pages | Arizton Advisory & Intelligence

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Report description:

Thailand data center market is expected to grow at a CAGR of 7.75% during 2022-2027.

Thailand witnessed the construction of data center facilities with a white floor area of over 105 thousand square feet in 2021 and will add a cumulative area of over 870 thousand square feet between 2022 and 2027. The market has witnessed several new entrants in the data center and cloud market. For instance, Telehouse and Chindata Group were among the new data center entrants, followed by Alibaba Cloud announcing the new cloud region, which is expected to be online in 2022.

MARKET OUTLOOK

- The digitalization across the country driven by COVID-19, availability of tax incentives, deployment of 5G services, and improved connectivity with other Asian countries such as China, Japan, Singapore, Taiwan, and others make Thailand an attractive market for investors.
- In Thailand, operators must obtain a Board of Investment (BOI) Promotion Certificate for planning, constructing, and operating data centers.
- The entry of new players such as Telehouse and Chindata Group and the development of cloud regions by major operators such as Tencent Cloud and Alibaba Cloud are likely to attract more global players to invest in the market during the forecast period.
- The three companies, AIS (Advanced Info Service), Singtel, and Gulf Energy, formed a joint Venture to develop data centers across the country. The construction to due to begin and is expected to be online by 2023.
- The country is also witnessing the deployment of modular data centers. For instance, Huawei Technologies invested around \$23 million to develop its third modular data center in the country.
- Bangkok is the primary location for data center investment in Thailand. The construction of Special Economic Zones (SEZs) and Free Trade Zones (FTZs) and the availability of infrastructure will attract investors to develop data center facilities in the coming years.
- Datacenter development in Eastern Corridor might attract nearby customers from heavy industries (Automotive, Manufacturing,

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& Petro Chemical) and food processing industries to opt for their IT operations in the data center.

WHY SHOULD YOU BUY THIS RESEARCH?

- Market size available in the investment, area, power capacity, and Thailand colocation market revenue.
- An assessment of the data center investment in Thailand by colocation, hyperscale, and enterprise operators.
- Datacenter investments in the area (square feet) and power capacity (MW) across cities.
- A detailed study of the existing Thailand data center market landscape, an in-depth industry analysis, and insightful predictions about the Thailand data center market size during the forecast period.
- Snapshot of existing and upcoming third-party data center facilities in Thailand
 - o□Facilities Covered (Existing): 32
 - o□Facilities Identified (Upcoming): 03
 - o□Coverage: 7 Cities
 - o□Existing vs. Upcoming (Data Center Area)
 - o□Existing vs. Upcoming (IT Load Capacity)
- Datacenter colocation market in Thailand
 - o□Market Revenue & Forecast (2021-2027)
 - o□Retail Colocation Pricing
- Explore Thailand data center landscape market investments in IT, power, cooling, and general construction services with sizing and forecasting.
- 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 operating in the industry.
- A transparent research methodology and the analysis of the demand and supply aspect of the market.

KEY HIGHLIGHTS OF THE REPORT

- Thailand has around 32 operational colocation data centers. Most colocation data centers are being developed according to Tier III standards. The country has the presence of global data center operator NTT Global Data Centers, which operates two facilities and is certified as Tier III.
- The COVID-19 impact, remote working has led to an increase in data generation at local levels. In addition, the digitalization, deployment of 5G services, and adoption of cloud-based services have led to the demand for data centers in the country.
- The rising adoption of cloud-based services is helping in the growth of retail and wholesale colocation services in the market. The market is witnessing increased demand for colocation spaces across existing data centers.
- Small scale companies across industries such as educational institutions, e-commerce, insurance, cloud-native start-ups, public sector (city councils), and others (mentioned above) will prefer retail colocation and other services such as managed hosting/connectivity cloud-based solutions.
- Wholesale colocation demand will come from local governments, travel & tourism, BFSI Sector, & Hospitals (mainly those that operate across Thailand).
- Hyperscale demand will come from content providers & cloud operators, followed by leading e-commerce companies, public sector agencies, and the banking sector.
- We believe Vantage Data Centers, Equinix, Digital Realty, Flow Digital, and Princeton Digital Group might enter the market in the next few years.
- The deployment of 5G networks will boost the digital economy of the country and will lead to higher demand for high-bandwidth networking infrastructure. The adoption of Software Defined Networking (SDN) is likely to increase owing to smart city initiatives carried out by government agencies.

THAILAND DATA CENTER MARKET VENDOR LANDSCAPE

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- Some of the key investors in the Thailand data center industries are Telehouse, Chindata Group, True IDC, Singtel, Gulf Energy, and AIS, Korea Telecom (KT) & Jasmine Telecom Systems (JTS) and ST Telemedia Global Data Centres, and Frasers Property Thailand.
- The hyperscale operator Amazon Web Services announced its plan to build and operate to edge zones across Bangkok. The zones are expected to be online by 2022-2023.
- The country is also witnessing an increase in the development of cloud regions. Tencent Cloud opened its second cloud region in Bangkok in June 2021. In addition, Alibaba Cloud has also announced its plan to develop a new cloud region in the country.
- Chindata Group, one of the new entrants in the market, has announced that it is currently finalizing a business acquisition in the country and will install 5 MW of IT power capacity.
- Telecom operators such as True Corporation, AIS (Advanced Info Service), and dtac have deployed 5G technology in some cities on a trial basis or are launching commercial 5G services.
- The data center operators are increasing their market share and presence across the country by either acquiring the data center operators or investing in the company. For instance, in January 2022, Etix Everywhere (Vantage Data Centers) acquired around 67% stake in Genesis Data Center by investing approximately \$10.8 million.

Major Vendors

IT INFRASTRUCTURE PROVIDERS

- Arista Networks
- Atos
- Cisco Systems
- Dell Technologies
- Fujitsu
- HPE
- Huawei Technologies
- IBM
- Inspur
- Lenovo
- NetApp

DATA CENTER CONSTRUCTION CONTRACTORS & SUB-CONTRACTORS

- Arup
- Architects 49
- Chaan
- Finishing Touch Design Studio
- Meinhardt Group
- Plan Architect
- PPS Group
- QTC Group

SUPPORT INFRASTRUCTURE PROVIDERS

- ABB
- Airedale International Air Conditioning
- Caterpillar
- Cummins
- Cyber Power Systems

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- Delta Electronics
- Eaton
- Fuji Electric
- HITEC Power Protection
- KOHLER
- Legrand
- Mitsubishi Electric
- Piller Power Systems
- Rittal
- Schneider Electric
- STULZ
- Siemens
- Vertiv

DATA CENTER INVESTORS

- Alibaba Cloud
- Huawei Technologies
- Internet Thailand
- KT Corporation
- Tencent Cloud
- True IDC

NEW ENTRANTS

- Chindata Group
- KT Corporation
- ST Telemedia Global Data Centres
- Telehouse

REPORT COVERAGE:

This report analyses the Thailand 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 market 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

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- o□Other Mechanical Infrastructure
- General Construction
- o□Core & Shell Development
- o□Installation & commissioning Services
- o□Building & Engineering Design
- o□Fire Detection & Suppression Systems
- o□Physical Security
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