

## **Singapore Data Center Market - Investment Analysis & Growth Opportunities 2022-2027**

Market Report | 2022-09-14 | 101 pages | Arizton Advisory & Intelligence

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### **Report description:**

Singapore data center market is expected to grow at a CAGR of 5.01% during 2022-2027.

### **MARKET OUTLOOK**

The Singapore data center market currently includes about 23 unique third-party data center service providers, operating more than 40 facilities. The country also has several on-premises or dedicated data centers owned by local enterprises.

-[]Singapore is one of the world's most steady and growing economies. In 2021, the country witnessed its economy at a staggering growth of over 7%. The country has also observed an increase in investments in internet technology, connectivity, and strengthening of the regulatory framework, attracting many investors.

-[]Due to the Impact of COVID-19, Singapore witnessed an increase in the demand for data center services, digitalization, and adoption of cloud services by the government and private sectors.

-[]In January 2022, The Singapore government withdrew the moratorium imposed on data centers. The moratorium was initially imposed on 2019 due to the high energy consumption by the data centers.

-[]The Data Center and Cloud Region in Singapore has witnessed an increase in investment from major providers. One of the key factors relating to this is the strategic location and excellent connectivity.

### **KEY HIGHLIGHTS OF THE MARKET**

a)[]Singapore is one of the top data center markets in the APAC. Lifting of the data center moratorium, digitalization, investment in 5G technology, rise in the use of social media, and increased adoption of renewable resources like solar are some of the major factors driving the Singapore data center market.

b)[]Singapore has around 40 operational colocation data centers. The major colocation operators are Keppel Data Centres, Equinix, and ST Telemedia Global Data Centres. Most colocation data centers are being developed according to Tier III standards.

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- c) Singapore's government provides free Trade Zones or economic areas that provide firms with beneficial customs and tax incentives. Some of the Free Trades Zones present in Singapore include Tanjong Pagar Terminal and Keppel Terminal, Sembawang Wharves, and more.
- d) An increase in the adoption of renewable energy is witnessed in Singapore According to Energy Market Authority (EMA), Singapore's total solar capacity stood at around 440 MW in Q1 2021. The Singapore Government aims to achieve a target of 2 GW by 2030.
- e) Singapore is also witnessing growth in connectivity with submarine cables, connecting major locations worldwide. Singapore observed a rapid rise in connectivity and submarine cables. with 12 new submarine cables that are under construction

#### DATA CENTER MARKET IN SINGAPORE VENDOR LANDSCAPE

- I. In 2021, Singapore received several investments from global and local data center operators such as Keppel Data Centres, Equinix, ST Telemedia Global Data Centres, Facebook (Meta), Microsoft, and BDS, among others.
- II. The rise in demand across industries has led data center suppliers to sign M&A contracts or acquire companies to expand their portfolios. In August 2021, Keppel Corporation announced to acquire the non-media assets of Singapore Press Holdings (SPH), which included data center assets and a joint-owned telco.
- III. In Singapore, the data center companies are collaborating with Construction Contractors to improve efficiency and requirements in the data center. The data center operator Global Switch partnered with PM Group for the construction of the second data center (Woodlands Data Center) in Singapore.

#### EXISTING VS. UPCOMING DATA CENTERS

- Existing Facilities in the region(Area and Power Capacity)
  - Eastern US
  - Southern US
  - Northern US
- List of Upcoming Facilities in the region(Area and Power Capacity)

#### WHY SHOULD YOU BUY THIS RESEARCH?

- a) Market size available in the investment, area, power capacity, and the Singapore colocation market revenue.
- b) An assessment of the data center investment in Singapore by colocation, hyperscale, and enterprise operators.
- c) Data center investments in the area (square feet) and power capacity (MW) across cities in the country.
- d) A detailed study of the existing Singapore data center market landscape, an in-depth industry analysis, and insightful predictions about the Singapore data center market size during the forecast period.
- e) Snapshot of existing and upcoming third-party data center facilities in Singapore
  - Facilities Covered (Existing): 40
  - Facilities Identified (Upcoming): 03
  - Coverage: 3 Regions
  - Existing vs. Upcoming (Data Center Area)
  - Existing vs. Upcoming (IT Load Capacity)
- f) Data center colocation market in Singapore
  - Colocation Market Revenue (2021-2027)
  - Retail vs. Wholesale Colocation Revenue (2021-2027)
  - Retail Colocation Pricing
  - Wholesale Colocation Pricing
- g) The Singapore data center landscape market investments are classified into IT, power, cooling, and general construction

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services with sizing and forecast.

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

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

j) A transparent research methodology and the analysis of the demand and supply aspect of the market.

#### REPORT COVERAGE:

This report analyses the Singapore 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
- Servers
- Storage Systems
- Network Infrastructure
- Electrical Infrastructure
- UPS Systems
- Generators
- Switches & Switchgears
- PDUs
- Other Electrical Infrastructure
- Mechanical Infrastructure
- Cooling Systems
- Rack Cabinets
- Other Mechanical Infrastructure
- Cooling Systems
- CRAC and CRAH Units
- Chillers Units
- Cooling Towers, Condensers, and Dry Coolers
- Economizers & Evaporative Coolers
- Other Cooling Units
- General Construction
- Core & Shell Development
- Installation & Commissioning Services
- Engineering & Building Design
- Fire Detection & Suppression
- Physical Security
- Data Center Infrastructure Management (DCIM)
- Tier Standard
- Tier I & Tier II
- Tier III
- Tier IV

#### VENDOR LANDSCAPE

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#### IT Infrastructure Providers

- [Arista Network
- [Broadcom
- [Cisco Systems
- [Dell Technologies
- [Hewlett Packard Enterprise (HPE)
- [Huawei Technologies
- [IBM
- [Inspur
- [Lenovo
- [MiTAC Holdings
- [NetApp
- [Quanta Cloud Technology (Quanta Computer)
- [Wistron (WIWYNN)

#### Data Center Construction Contractors & Sub-Contractors

- [Arup Group
- [AWP Architects
- [Aurecon Group
- [AECOM
- [Cundall
- [DSCO Group
- [Fortis Construction
- [Faithful+Gould
- [Gammon Construction
- [HDR Architecture
- [Kienta Engineering Construction
- [LSK Engineering
- [M+W Group
- [NTT FACILITIES
- [PM Group
- [Sato Kogyo

#### Support Infrastructure Providers

- [ABB
- [Bosch Security Systems
- [Caterpillar
- [Cummins
- [Eaton
- [Fuji Electric
- [HITEC Power Protection
- [KOHLER-SDMO
- [Legrand
- [Mitsubishi Electric Corporation
- [Piller Power Systems
- [Rolls-Royce Power Systems
- [Rittal

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- Schneider Electric
- Vertiv Group

#### Data Center Investors

- BDX (Big Data Exchange)
- Facebook
- Keppel Data Centres
- Microsoft
- ST Telemedia Global Data Centres

#### KEY QUESTIONS ANSWERED

- 1.□What will be the market size of the Singapore data center market?
- 2.□How many data centers are there in Singapore?
- 3.□What are the driving factors in the Singapore data center market?
- 4.□Who are key investors in the market in 2022?

#### Table of Contents:

##### Chapter 1: Existing & Upcoming Third-Party Data Centers in Singapore

- Historical Market Scenario
- 41 Unique Data Center Properties
- Data Center IT Load Capacity
- Data Center White Floor Area Space
- Existing Vs Upcoming Data Center Capacity by Locations
- Locations Covered
  - o□Eastern Singapore
  - o□Southern Singapore
  - o□Northern Singapore
- List of Upcoming Data Center Facilities

##### Chapter 2: Investment Opportunities in Singapore

- Microeconomic and Macroeconomic factors of Singapore Market
- Investment Opportunities in Singapore
- Impact of Moratorium in Singapore
- Investment by Area
- Investment by Power Capacity

##### Chapter 3: Data Center Colocation Market in Singapore

- Colocation Services Market in Singapore
- Data Center Demand Factors in Singapore
- Retail vs Wholesale Data Center Colocation
- Colocation Pricing (Quarter Rack, Half Rack, Full Rack) & Add-ons

##### Chapter 4: Market Dynamics

- Market Drivers
- Market Trends
- Market Restraints

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## Chapter 5: Market Segmentation

- IT Infrastructure: Market Size & Forecast
- Electrical Infrastructure: Market Size & Forecast
- Mechanical Infrastructure: Market Size & Forecast
- General Construction Services: Market Size & Forecast

## Chapter 6: Tier Standard Investment

- Tier I & II
- Tier III
- Tier IV

## Chapter 7: Key Market Participants

- IT Infrastructure Providers
- Construction Contractors
- Support Infrastructure Providers
- Data Center Investors

## Chapter 8: Appendix

- Market Derivation
- Quantitative Summary

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