

South Africa Data Center Market - Investment Analysis & Growth Opportunities 2022-2027

Market Report | 2022-11-21 | 118 pages | Arizton Advisory & Intelligence

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Report description:

South Africa data center market is expected to grow at a CAGR of 11.15% during 2022-2027.

MARKET OUTLOOK

South Africa is the top data center market in Africa. The increase in internet and social media penetration driven by COVID-19, deployment of 5G, improved inland connectivity, and low electricity and land prices make South Africa an attractive market for investors.

- Johannesburg is the primary location for data center investment in South Africa, followed by Cape Town, Durban, Centurion, and other cities such as Port Elizabeth.
- Hybrid cloud services are gaining increased traction in South Africa. Most enterprises use private and public cloud environments to improve information sharing and efficiently manage data in the country.
- The increasing investment in renewable energy sources such as solar and wind will drive interest among data center operators to sign PPAs to procure renewable energy to power facilities in the country.
- The development of Special Economic Zones (SEZs), Free Trade Zones (FTZs), and smart city investments will also boost the data center market in South Africa.

KEY HIGHLIGHTS OF THE REPORT

1. South Africa has over 20 operational colocation data centers. Most colocation data centers are being developed according to Tier III standards. For instance, Digital Parks Africa's Samrand data center has received Tier III certification by Uptime Institute for its design documents.
2. The COVID-19 impact and remote working has led to an increase in data generation at local levels. In addition, migration from

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on-premises to colocation, cloud, and managed services will boost the data center market in South Africa.

3. Africa Data Centres and Teraco (Digital Realty) are among the top operators in the country and have planned to increase their footprint with new data center investments and expansion activities.

4. The introduction of the Protection of Personal Information Act (POPIA) in South Africa will protect the confidentiality of the personal data of the citizens, which will boost the market.

5. The country is also witnessing improvements in submarine and inland connectivity. For instance, 2Africa, the longest subsea cable, will connect South Africa with other countries such as India, the UAE, Saudi Arabia, Spain, the UK, Oman, and other countries.

6. South Africa has multiple smart city projects. For Instance, The Lanseria Smart City will be built near the Lanseria International Airport, near Johannesburg, and will take around 25 years to complete.

WHY SHOULD YOU BUY THIS RESEARCH?

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

- An assessment of the data center investment in South Africa 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 Africa data center market landscape, an in-depth industry analysis, and insightful predictions about South Africa data center market size during the forecast period.

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

- o Facilities Covered (Existing): 22

- o Facilities Identified (Upcoming): 03

- o Coverage: 3 Cities

- o Existing vs. Upcoming (Area)

- o Existing vs. Upcoming (IT Load Capacity)

- Data center colocation market in South Africa

- o Colocation Market Revenue & Forecast (2021-2027)

- o Wholesale vs. Retail Colocation Revenue (2021-2027)

- o Retail Colocation Pricing

- o Wholesale Colocation Pricing

- South Africa 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 operating in the industry.

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

VENDOR LANDSCAPE

1. Some of the key colocation investors in South Africa in 2021 included Africa Data Centres, Teraco (Digital Realty), Digital Parks Africa, and others.

2. The country has also witnessed new entrants in the market that are increasing its footprint. NTT Global, Vantage, and Open Access Data Centers (OADC) are among the new entrants.

3. Open Access Data Centres (OADC) is one of the top edge data center operators in South Africa and has planned to launch over 100 edge sites in the country by 2022.

4. The country is also witnessing an increase in the adoption of cloud services. Microsoft, Amazon Web Services, Oracle, and IBM have a strong presence in the country. In January 2022, Oracle launched a new cloud region in Johannesburg.

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5. Telecom operators such as MTN, Vodacom, and rain have either deployed 5G technology in some cities on a trial basis or are in the process of launching commercial 5G services across the country.
6. In September 2022, Google announced its plan to open a new cloud region in Cape Town, which will be located at the upcoming data center facility of Africa Data Centres in Cape Town.
7. Operators are increasing their presence across the country by either acquiring operators or investing in the company. For instance, Digital Realty acquired a majority stake of around 55% in Teraco for about \$3.5 billion.

IT INFRASTRUCTURE PROVIDERS

- Atos
- Cisco Systems
- Dell Technologies
- Fujitsu
- Hewlett Packard Enterprise
- Hitachi Vantara
- Huawei Technologies
- IBM
- Juniper Networks
- Lenovo
- ZTE

DATA CENTER CONSTRUCTION CONTRACTORS & SUB-CONTRACTORS

- Abbeydale
- AECOM
- Arup
- b2 Architects
- EDS Engineers
- H&MV Engineering
- Ingenium
- ISF Group
- ISG
- LYT Architecture
- MWK Engineering
- Royal Haskoning
- Tri-Star Construction

SUPPORT INFRASTRUCTURE PROVIDERS

- ABB
- Alfa Laval
- Caterpillar
- Cummins
- Delta Electronics
- Eaton
- EVAPCO
- Enlogic
- Johnson Controls
- Legrand
- Master Power Technologies

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- Pillar Power Systems
- Rittal, Rolls-Royce
- Schneider Electric
- Siemens
- STULZ
- Vertiv

DATA CENTER INVESTORS

- Africa Data Centres
- Digital Parks Africa
- Teraco (Digital Realty)

NEW ENTRANTS

- Google
- NTT Global Data Centers
- Open Access Data Centres (OADC)
- Vantage Data Centers

EXISTING VS. UPCOMING DATA CENTERS

- Existing Facilities in the region(Area and Power Capacity)
 - o Johannesburg
 - o Cape Town
 - o Other Cities (Centurion, Durban, Kempton Park, Midrand, and Sandton)
- List of Upcoming Facilities in the region(Area and Power Capacity)

REPORT COVERAGE:

This report analyses South Africa 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 Transfer Switches & Switchgears
 - o PDUs
 - o Other Electrical Infrastructure
- Mechanical Infrastructure
 - o Cooling Systems
 - o Rack Cabinets
 - o Other Mechanical Infrastructure

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- Cooling Systems
 - o□CRAC & CRAH Units
 - o□Chiller Units
 - o□Cooling Towers, Condensers & Dry Coolers
 - o□Other Cooling Units

- General Construction
 - o□Core & Shell Development
 - o□Installation & commissioning Services
 - o□Building & Engineering 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
 - o□Tier IV

- Geography Segmentation
 - Johannesburg
 - Other Cities

KEY QUESTIONS ANSWERED

- 1.□How big is the south africa data center market?
- 2.□How much mw of power capacity will be added across south africa during 2022-2027?
- 3.□What factors are driving the south africa data center market?
- 4.□Which all cities are included in south africa data center market report?
- 5.□What is the growth rate of the south africa data center market?

Table of Contents:

- 1.□Existing & Upcoming Third-Party Data Centers in the South Africa
 - 1.1.□Historical Market Scenario
 - 1.2.□40+ Unique Data Center Properties
 - 1.3.□Data Center IT Load Capacity
 - 1.4.□Data Center White Floor Area
 - 1.5.□Existing Vs Upcoming Data Center Capacity by Cities
 - 1.6.□Cities Covered
 - 1.6.1.□Johannesburg
 - 1.6.2.□Other Cities
 - 1.7.□List of Upcoming Data Center Facilities

- 2.□: Investment Opportunities in South Africa
 - 2.1.□Microeconomic and Macroeconomic factors of the South Africa Market
 - 2.2.□Investment Opportunities in the South Africa

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- 2.3.□Investment by Area
- 2.4.□Investment by Power Capacity

- 3.□Data Center Colocation Market in South Africa
 - 3.1.□Colocation Services Market in the South Africa
 - 3.2.□Retail vs Wholesale Data Center Colocation
 - 3.3.□Colocation Pricing (Quarter Rack, Half Rack, Full Rack) & Add-ons

- 4.□Market Dynamics
 - 4.1.□Market Drivers
 - 4.2.□Market Trends
 - 4.3.□Market Restraints

- 5.□Market Segmentation
 - 5.1.□IT Infrastructure: Market Size & Forecast
 - 5.2.□Electrical Infrastructure: Market Size & Forecast
 - 5.3.□Mechanical Infrastructure: Market Size & Forecast
 - 5.4.□General Construction Services: Market Size & Forecast

- 6.□Tier Standard Investment
 - 6.1.□Tier I & II
 - 6.2.□Tier III
 - 6.3.□Tier IV

- 7.□ Geography
 - 7.1.□Johannesburg
 - 7.2.□Other Cities

- 8.□Key Market Participants
 - 8.1.□IT Infrastructure Providers
 - 8.2.□Construction Contractors
 - 8.3.□Support Infrastructure Providers
 - 8.4.□Data Center Investors
 - 8.5.□New Entrants

- 9.□Appendix
 - 9.1.□Market Derivation
 - 9.2.□Quantitative Summary

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