

APAC Data Center Market Landscape 2023-2028

Market Report | 2023-06-28 | 139 pages | Arizton Advisory & Intelligence

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Report description:

The APAC data center market will witness investments of USD 96.85 billion by 2028.

Rising 5G Deployments Are Driving the Growth of Edge Data Centers in the APAC Region

5G technology is adopted across the region in China, Australia, Japan, Singapore, South Korea, and other countries. High-computing power and increased connectivity standards drive the deployment of 5G across data centers in multiple locations. Some examples are mentioned below. For instance, In November 2022, the China government announced the allocation of the country's first private 5G spectrum to the Commercial Aircraft Corporation of China (COMAC).

Growing Adoption of Innovative It Infrastructure Will Drive the Demand for Advanced Technologies in the IT Infrastructure Market

Some IT infrastructure trends witnessed in the industry include the adoption of NVMe storage, an increase in the adoption of 200/400 GbE ports, the adoption of ARM-based architecture, server virtualization, and the adoption of converged and hyper-converged infrastructure.

SEGMENTATION INSIGHTS

- Servers are available in a variety of types and configurations. Regarding form factors, servers are classified as rack, blade, and tower. The most common servers in the industry include rack and blade servers from vendors such as Cisco Systems, Hewlett Packard Enterprise, Dell Technologies, IBM, Lenovo, and NetApp.
- There is an increasing opportunity for vendors providing lithium-ion and nickel-zinc batteries used in UPS systems. Operators can also adopt new-age generator sets that run on hydrotreated vegetable oil (HVO), natural gas, etc.
- APAC data center market is witnessing the adoption of water- and air-based cooling solutions, with water-based cooling solutions witnessing major demand in Southeast Asia due to the tropical climate.

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Segmentation by Facility Type

- Hyperscale Data Centers
- Colocation Data Centers
- Enterprise Data Centers

Segmentation by Infrastructure

- IT Infrastructure
- Electrical Infrastructure
- Mechanical Infrastructure
- General Construction

Segmentation by IT Infrastructure

- Server Infrastructure
- Storage Infrastructure
- Network Infrastructure

Segmentation by Electrical Infrastructure

- UPS Systems
- Generators
- Transfer Switches & Switchgear
- Power Distribution Units
- Other Electrical Infrastructure

Segmentation by Mechanical Infrastructure

- Cooling Systems
- Racks
- Other Mechanical Infrastructure

Segmentation by Cooling Systems

- CRAC & CRAH Units
- Chiller Units
- Cooling Towers, Condensers, and Dry Coolers
- Economizers & Evaporative Coolers
- Other Cooling Units

Segmentation by Cooling Techniques

- Air-based Cooling Technique
- Liquid-based Cooling Technique

Segmentation by General Construction

- Core & Shell Development
- Installation & Commissioning Services
- Engineering & Building Design
- Physical Security
- Fire Detection & Suppression
- DCIM

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Segmentation by Tier Standard

- Tier I & II
- Tier III
- Tier IV

GEOGRAPHICAL ANALYSIS

- The APAC data center market is one of the significantly growing global markets, with a major contribution from countries such as China, Australia, India, and Japan, with other countries such as Hong Kong, South Korea, Taiwan, and New Zealand with growing data center activities.
- In Southeast Asia, Singapore witnessed a setback due to the moratorium on data center construction. The moratorium was lifted in 2022, and the industry is expected to get on track in the next 2-3 years.

Segmentation by Geography

- APAC
 - o□ China
 - o□ Hong Kong
 - o□ Australia
 - o□ New Zealand
 - o□ India
 - o□ Japan
 - o□ South Korea
 - o□ Taiwan
 - o□ Rest of APAC
- Southeast Asia
 - o□ Singapore
 - o□ Indonesia
 - o□ Malaysia
 - o□ Thailand
 - o□ Philippines
 - o□ Vietnam
 - o□ Other Southeast Asian Countries

VENDOR LANDSCAPE

- The APAC data center market has the presence of IT infrastructure vendors such as Arista Networks, Atos, Cisco Systems, Dell Technologies, Hewlett Packard Enterprise, IBM, Juniper Networks, and others. Vendors are continuously innovating their offerings to meet up with the industry demand.

IT INFRASTRUCTURE PROVIDERS

- Arista Networks
- Atos
- Cisco Systems
- Dell Technologies
- Broadcom

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- []Extreme Networks
- []Fujitsu
- []Hewlett Packard Enterprise
- []Hitachi Vantara
- []Huawei
- []IBM
- []Inspur
- []Intel
- []Juniper Networks
- []Lenovo
- []Micron Technology
- []NEC
- []NetApp
- []Oracle
- []Pure Storage
- []Quanta Cloud Technology
- []QNAP
- []Quantum
- []Seagate Technology
- []Super Micro Computer
- []Toshiba
- []Western Digital
- []Wiwynn

Key Construction Contractors

- []AECOM
- []Arup
- []Aurecon Group
- []CSF Group
- []DSCO Group
- []Gammon Construction
- []Larsen & Toubro (L&T)
- []NTT Facilities
- []PM Group
- []Studio One Design

Other Prominent Construction Contractors

- []AWP Architects
- []BYME Engineering
- []Chung Hing Engineers Group
- []Corgan
- []CTCI
- []DPR Construction
- []Faithful+Gould
- []Fortis Construction
- []Hutchinson Builders
- []ISG

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- []Kienta Engineering Construction
- []Linesight
- []LSK Engineering
- []M+W Group
- []Nakano Corporation
- []Obayashi Corporation
- []Powerware Systems (PWS)
- []Sato Kogyo
- []Sterling and Wilson
- []Red Engineering
- []Rider Levett Bucknall
- []Turner & Townsend

Prominent Support Infrastructure Vendors

- []ABB
- []Caterpillar
- []Cummins
- []Eaton
- []Rittal
- []Schneider Electric
- []STULZ
- []Vertiv

Other Prominent Support Infrastructure Vendors

- []Airedale
- []Alfa Laval
- []Canovate
- []Cyber Power Systems
- []Delta Electronics
- []EAE
- []Fuji Electric
- []Green Revolution Cooling (GRC)
- []HITEC Power Protection
- []KOHLER Power
- []Legrand
- []Mitsubishi Electric
- []Narada
- []Piller Power Systems
- []Rolls-Royce
- []Shenzhen Envicool Technology
- []Siemens
- []Socomec
- []Trane

Prominent Data Center Investors

- []AirTrunk
- []Amazon Web Services (AWS)

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- Digital Realty
- Equinix
- GDS Services
- Keppel Data Centres
- NTT Global Data Centers
- NEXTDC
- ST Telemedia Global Data Centres

Other Prominent Data Center Investors

- Bridge Data Centres
- Big Data Exchange (BDx)
- CDC Data Centres
- Chayora
- Chindata Group
- Colt Data Centre Services
- CtrlS Datacenters
- Digital Edge DC
- Facebook (Meta)
- Google
- Huawei Technologies
- Iron Mountain
- LG Uplus
- Microsoft
- Nxtra by Airtel
- OneAsia Network
- Open DC
- Pi Datacenters
- Princeton Digital Group (PDG)
- Regal Orion
- SpaceDC
- SUNeVison Holdings (iAdvantage)
- Sify Technologies
- Tenglong Holding Group
- Viettel IDC
- VNET
- Yotta Infrastructure Solutions

New Entrants

- AdaniConneX
- Data Center First
- Edge Centres
- EdgeConneX
- Evolution Data Centres
- Hickory
- MettaDC
- Nautilus Data Technologies
- Pure Data Centres Group

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- []Vantage Data Centers
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- []YTL Data Center
- []Yondr

KEY QUESTIONS ANSWERED:

- 1.[]How big is the APAC data center market?
- 2.[]What is the growth rate of the APAC data center market?
- 3.[]What is the estimated market size in terms of area in the APAC data center market by 2028?
- 4.[]What are the key trends in the APAC data center industry?
- 5.[]How many MW of power capacity is expected to reach the APAC data center market by 2028?

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