

South Africa Data Center Market - Investment Analysis & Growth Opportunities 2024-2029

Market Report | 2024-02-22 | 125 pages | Arizton Advisory & Intelligence

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Report description:

The South Africa data center market is expected to grow at a CAGR of 8.44% during the forecast period. 2023-2029.

KEY HIGHLIGHTS

- In South Africa, Johannesburg and Cape Town are the hubs for data center development. At the same time, other cities such as Centurion, Durban, and Port Elizabeth, among others, are also expected to grow in the South Africa data center market during the forecast period.
- In 2023, South Africa received investments from several colocation data center operators, expanding their market presence. For instance, in November 2023, Open Access Data Centres (OADC) grew its Johannesburg data center facility in South Africa, expanding its power capacity to 4MW and 600 racks, expected to be complete in Q1 2024. Equinix and Vantage Data Centers are among the prominent ones.
- The South Africa data center market witnessed growth in investments from cloud providers such as AWS, Google, Microsoft, Huawei, and Oracle. For instance, in April 2023, AWS announced its plan to invest \$1.66 billion in expanding its cloud infrastructure in South Africa by 2029.
- Digital connectivity is growing strongly with the advent of submarine cables, such as 2Africa, which is supposed to be operational by 2024, and T3, which is supposed to be operational by the end of 2024, helping to reduce latency. This reduction in latency has made it possible for data center operators to offer faster and more reliable services to their customers, which has driven investments in the South Africa data center market.
- Operators such as Vantage Data Centers, Africa Data Centres, and Teraco (Digital Realty) are procuring renewable energy. This strategic move not only aligns with their sustainability goals but also creates a positive impact on the environment and community.
- The ICT sector in South Africa has significant potential, which is expected to grow to more than USD 60 billion by 2028. Several enterprises and organizations are migrating their workloads to the cloud platform, boosting the colocation market.

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WHY SHOULD YOU BUY THIS RESEARCH?

- Market size regarding investment, area, power capacity, and South Africa colocation market revenue is available.
- An assessment of the data center investment in South Africa by colocation, hyperscale, and enterprise operators.
- 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 market size during the forecast period.
- Snapshot of existing and upcoming third-party data center facilities in South Africa
- I.□Facilities Covered (Existing): 53
- II.□Facilities Identified (Upcoming): 10
- III.□Coverage: 29+ Cities
- IV.□Existing vs. Upcoming (Area)
- V.□Existing vs. Upcoming (IT Load Capacity)
- Data Center Colocation Market in South Africa
- I.□Colocation Market Revenue & Forecast (2023-2029)
- II.□Wholesale vs. Retail Colocation Revenue (2023-2029)
- III.□Retail Colocation Pricing
- IV.□Wholesale Colocation Pricing
- The South Africa data center 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 market.
- A transparent research methodology and the analysis of the demand and supply aspects of the market.

VENDOR LANDSCAPE

- The presence of several global support infrastructure providers will increase the market's competitiveness and lower infrastructure prices in the coming years. Some support infrastructure vendors in the South Africa data center market include ABB, Alfa Laval, Caterpillar, Cummins, Eaton, etc.
- The South Africa data center market has the presence of several local and global construction contractors, such as EDS Engineering, Arup, b2 Architects, Abbeydale, Ingenium, and others, which have catered to multiple data center projects in the country. For instance, EDS Engineering has provided civil and structural engineering services to Teraco's (Digital Realty) data center facilities JB1, JB3, JB2, CT2, and JB4.
- Some key South Africa data center market investors are Africa Data Centres, Digital Parks Africa, Equinix, NTT Global Data Centers, Open Access Data Centres (OADC), Teraco (Digital Realty), and Vantage Data Centers.

IT Infrastructure Providers

- Atos
- Cisco Systems
- Dell Technologies
- Fujitsu
- Hewlett Packard Enterprise
- Hitachi Vantara

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- [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
- [Rider Levett Bucknall (RLB)
- [Royal HaskoningDHV
- [Tri-Star Construction

Support Infrastructure Providers

- [ABB
- [Alfa Laval
- [Caterpillar
- [Cummins
- [Delta Electronics
- [Eaton
- [EVAPCO
- [Enlogic
- [Johnson Controls
- [Legrand
- [Master Power Technologies
- [Piller Power Systems
- [Rittal
- [Rolls-Royce
- [Schneider Electric
- [Siemens
- [STULZ
- [Vertiv

Data Center Investors

- [Africa Data Centres
- [Digital Parks Africa
- [Equinix
- [NTT Global Data Centers

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- []Open Access Data Centres (OADC)
- []Teraco (Digital Realty)
- []Vantage Data Centers

New Entrants

- []Paratus Namibia

EXISTING VS. UPCOMING DATA CENTERS

- []Existing Facilities in the Region (Area and Power Capacity)
- []Johannesburg
- []Cape Town
- []Other Cities
- []List of Upcoming Facilities in the region (Area and Power Capacity)
- []Johannesburg
- []Cape Town
- []Other Cities

REPORT COVERAGE:

This report analyses the 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
- []Servers
- []Storage Systems
- []Network Infrastructure
- []Electrical Infrastructure
- []UPS Systems
- []Generators
- []Transfer Switches & Switchgears
- []PDUs
- []Other Electrical Infrastructure
- []Mechanical Infrastructure
- []Cooling Systems
- []Rack Cabinets
- []Other Mechanical Infrastructure
- []Cooling Systems
- []CRAC & CRAH Units
- []Chiller Units
- []Cooling Towers, Condensers & Dry Coolers
- []Other Cooling Units
- []General Construction
- []Core & Shell Development
- []Installation & Commissioning Services
- []Engineering & Building Design

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- Fire Detection & Suppression Systems
- Physical Security
- Data Center Infrastructure Management (DCIM)
- Tier Standard
- Tier I & Tier II
- Tier III
- Tier IV
- Geography
- Johannesburg
- Other Cities

KEY QUESTIONS ANSWERED:

- 1.□How big is the South Africa data center market?
- 2.□How many existing and upcoming data center facilities exist in South Africa?
- 3.□What is the growth rate of the South Africa data center market?
- 4.□How much MW of power capacity will be added across South Africa during 2024-2029?
- 5.□What factors are driving the South Africa data center market?
- 6.□Who are the key South Africa data center market investors?

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