

Singapore Data Center Server - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2030

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

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Report description:

The Singapore data center server market reached a value of USD 2.9 billion in the previous years, and it is further projected to register a CAGR of 2.7% during the forecast period. The increasing demand for cloud computing among small and medium-sized enterprises (SMEs), government regulations for local data security, and growing investment by domestic players are some of the major factors driving the demand for data centers in the country/region.

Key Highlights

- Under Construction IT Load Capacity: The upcoming IT load capacity of the Singapore data center market is expected to reach 1000 MW by 2029.
- Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase to 3.3 million sq. ft by 2029.
- Planned Racks: The country's total number of racks to be installed is expected to reach 165.5K units by 2029. East Singapore is expected to house the maximum number of racks by 2029.
- Planned Submarine Cables: There are close to 14 submarine cable systems connecting Singapore, and many are under construction. One such submarine cable that is estimated to start service in 2023 is Asia Direct Cable (ADC), which stretches over 9800 Kilometers with landing points from Tuas, Singapore.

Singapore Data Center Server Market Trends

BFSI to Hold Significant Growth

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- In Singapore, with the rise of online banking and mobile payment systems, financial institutions are able to process transactions quickly and securely. Data centers provide the high-speed connectivity and processing power needed to ensure that transactions are processed in real-time, reducing the risk of errors or delays. Such factors lead to a major demand for servers for better computing.
- Capco surveyed 1,000 Singapore consumers to gauge their behavior towards banking services at a time of rapid change in the retail banking industry. The survey states that 81% of Singapore banking customers using mobile apps want to access banking services.
- Companies such as Grab Holdings are making strategic collaborations to capitalize on the growing market. Their joint venture with Singapore Telecommunication GXS Bank provides digital banking services to the retail sector. Recently, Singaporean businesses Grab and tech company Sea obtained 'digital full bank' licenses, enabling them to accept deposits and provide services locally to both retail and corporate customers, now serving more than 3 million customers.
- Several fintech startups are further boosting the market by attaining strategic partnerships with cloud service providers to automate their respective payment portals. In April 2022, Wallet Engine partnered with Mambu to fast-track the development of its innovative wallet-as-a-service offering, which aims to become the go-to solution for embedding financial services into any app.
- Overall, with increasing fintech firms, the demand for data centers will increase potentially, leading to demand for the server market.

Rack Server to Hold Significant Share

- Rack servers are compact and efficient devices that can handle a variety of computing tasks and are commonly used in data center environments where space is at a premium. In Singapore, various end users prefer rack servers as it is more cost-effective than blade servers,
- The data center industry has begun to gain momentum with attractive investments from hyperscale cloud providers such as Google, Alibaba, and Amazon. Due to the pandemic, Google announced its third data center in the country, representing a long-term investment of about USD 850 million.
- The rising dominance of the 5G network is further adhering telecom vendors to invest in the data center. In July 2022, Singtel was confirmed to have achieved more than 95% standalone 5G coverage across Singapore, three years ahead of the regulatory target of end-2025, covering more than 1,300 outdoor locations.
- Moreover, in August 2022, The Infocomm Media Development Authority (IMDA) on Wednesday (Aug 3) unveiled three more 5G projects to help Singapore use the fifth-generation mobile network in different areas. The projects involve 5G usage in augmented reality (AR), health technology, and the maritime sector. This would increase the demand for bandwidth due to increased data traffic, further driving the demand for rack servers.

Singapore Data Center Server Industry Overview

The Singapore data center server market is consolidated among the players and has gained a competitive edge in recent years. A few major players are Fujitsu Limited, Hewlett Packard Enterprise, Dell Inc., and others. These major players, with a prominent market share, focus on expanding their customer base across the region. These companies leverage strategic collaborative initiatives to increase their market share and profitability.

In July 2023, Supermicro, Inc. announced several new servers to its already broad application-optimized product line. These new servers incorporate the new AmpereOne CPU, with up to 192 single-threaded cores and up to 4 TB of memory capacity. Applications such as databases, telco edge, web servers, caching services, media encoding, and video gaming streaming will

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benefit from increased cores, faster memory access, higher performance per watt, scalable power management, and the new cloud security features.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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