Thailand Data Center Construction - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Thailand data center construction market is projected to register a CAGR of 12.53%. Bangkok is well-positioned to connect investors to new opportunities arising from the increasing border trade and the region's rapid economic growth. With the huge potential of the country's renewable energy and a focus on sustainability, the number of facilities is expected to increase during the forecast period.

Key Highlights
-In Bangkok, data centers cater to exemptions on raw materials and machinery import duties. Bangkok is the focus for much of Thailand's ocean and air freight. The capital city has both an airport and a seaport. Cisco System Inc. and Thailand are collaborating on a framework for digitalization across the country to accelerate Thailand's digital and creative economies. Cisco's CDA (Cisco's Country Digital Acceleration) program in Thailand will focus on three key areas: digital acceleration of local enterprises, technology and business innovation, and digitization of national infrastructure.
-The Digital Economy Promotion Agency (DEPA) wants to pursue six projects to drive the country's digital economy and smart city development under its fiscal 2023 budget. DEPA aims to allot THB 150 million (USD 4.3 million) to six projects to support the country's digital economy. Such instances are expected to cater to segment growth. Such developments are expected to drive opportunities for the vendors studied in the market.
-Women's mobile health (m-health) applications are currently widely used for health education, medication, prevention of illness, etc. Several developers are attempting to capitalize on this trend by designing m-health apps for the Thai healthcare system. For instance, the Government of Thailand has implemented smart technology as a medical service component for mothers using apps such as KhunLook, KidDiary, and MyYaAndYou. Such a scenario adds more data and increases the dependence on data centers in the country, resulting in opportunities for the vendors in the market.
-Environmental, cost and workforce-related challenges could restrain the global data center construction market. The

environmental impacts are wide-reaching, impacting climate change, pollution, biodiversity, and natural resources. Though the challenges are broad, they present many opportunities for improvement and long-lasting positive impact. The cost of constructing the data center is also high, which could restrain small and medium enterprises from setting up a new center. The vendor's focus is on the regions that have lower costs for construction.

-The pandemic resulted in remote working, which in turn led to increased data generation locally. In addition, digitalization, 5G services deployment, and cloud-based services have led to data center demand in the country. Telecom operators such as True Corporation, AIS (Advanced Info Service), and Digital Technology Assesment Criteria (DTAC) have deployed 5G technology in some cities on a trial basis or launched commercial 5G services.

Thailand Data Center Construction Market Trends

Tier 3 is the Largest Tier Type

- The country has no facility certified with Tier 1 and Tier 2. The tier 3 data center segment reached an IT load capacity of 71.4 MW in 2021. The capacity is anticipated to grow from 74.3 MW in 2022 to 199.5 MW by 2029 at a CAGR of 15.15%. The tier 4 data center segment reached an IT load capacity of 20 MW in 2021. The capacity is anticipated to grow from 20 MW in 2022 to 50 MW by 2029 at a CAGR of 13.9%.
- In most Thai facilities, IT components can be replaced or removed without interrupting routine data center operations, so most facilities are Tier 3 certified.
- Currently, only one facility in Thailand has Tier 4 certification, i.e., SUPERNAP Thailand. It has a high fault-tolerant facility, which is ideal for consistently high traffic levels. National Telecom (NT), TOT, and SUPERNAP (Thailand) signed an MoU supporting governmental digital modernization, which is called the Data Center and Cloud Services Partnership Program.

Medium-Sized Data Centers is Expected to Hold Significant Market Share

- Medium-sized data centers are projected to register a growth of 3.4% during 2022-2029 to reach 38.4 MW by 2029. The increase in the number of start-ups and micro, small, and medium enterprises (MSMEs) in the country is contributing to the growth of the small data centers in the country. Small-scale companies across industries such as educational institutions, e-commerce, insurance, cloud-native start-ups, and the public sector (city councils) are contributing to the use of small-sized data centers.
- There are around 17 medium data centers in the country, wherein the majority of the data centers are concentrated in Bangkok, and the remaining data centers are concentrated in other parts of the country. More than 50% of these facilities are Tier 3 certified.
- With a capacity of 11.69 MW, CS LoxInfo-based data center has the highest capacity among the medium-sized data centers, with eight data centers that are medium-sized, followed by True Internet Data Center Co. Ltd, with a capacity of 7.3 MW, holding three medium-sized data centers.
- The ongoing construction of medium data center facilities, such as True Internet Data Center Co. Ltd and Nautilus Data Technologies, is further projected to contribute to the growth of the segment during the forecast period.

Thailand Data Center Construction Industry Overview

 Thailand's Data Center Construction Market is fairly consolidated, with the top five companies occupying the majority of the market share. Some of the major companies are Arup Group, Delta Electronics (Thailand), TAKNET Systems (Thailand) Co., Ltd.,

Project Planning Service, and Gulf Energy Development Public Company Limited.

In June 2023, Evolution Data Centers, a Singaporean firm, partnered with Thai property developer Central Pattana PCL to build a 34 MW carrier-neutral data center in Thailand for Cloud providers in the country. The company aims to build a greener hyperscale data center, resulting in opportunities for the vendors in the market.

In March 2023, NTT Ltd announced to develop a large data center in Bangkok with an investment of USD 90 million, and it is expected to be operational by the end of 2024. Such investments are expected to create opportunities for the vendors in the market.

Additional Benefits:

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

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