Thailand Data Center Rack - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2030

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Report description:

The Thailand data center rack market reached a volume of 31,322 in the previous year, and it is further projected to register a CAGR of 5% during the forecast period. The increasing demand for cloud computing among 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 Philippines data center market is expected to reach more than 270 MW by 2029.
-Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase to 6 million sq. ft by 2029.
-Planned Submarine Cables: There are close to 12 submarine cable systems connecting Thailand, and many are under construction. One such submarine cable that is estimated to start service in 2023 is Southeast Asia-Japan Cable 2 (SJC2), which stretches over 10,500 Kilometers with landing points from Songkhla, Thailand.

Thailand Data Center Rack Market Trends

IT & Telecommunication Segment holds the major share.

- In the next five years, Thailand will rapidly adopt hybrid cloud services, with 67% of respondents agreeing to the adoption plan.

Digital media, financial services, retail, and manufacturing are the main cloud customers in this country, as Thai businesses planned to set out an effective cloud migration strategy to gain the benefits of digital transformation. In addition, in 2020, Thailand scored 20.1 for cloud regulation and was ranked 11th out of Asia Pacific countries when it came to this category.
- Further, in the context of investment under new Thai regulations, in May 2022, Alibaba Cloud, the digital technology and intellectual backbone of Alibaba Group, launched its first data center in Thailand to bolster local businesses' digital innovation capabilities.
- The telecommunications sector in Thailand has a customer base of over 60 million, making it the major telecommunications sector in Southeast Asia, according to an industry expert. In addition, Google predicts Thailand to be the second-largest internet economy, worth USD 50 billion by 2025. There are three large players in the market, including AIS, TrueMove, and DTAC. The fourth operator, National Telecom (NT), was formed in January 2021 after the merger of two state-owned telecom operators (CAT and TOT). Rollouts of its network to enhance quality and speed, along with investment in 5G technology, will be key areas of development.
- More than 85% of Thailand's population is expected to have 5G coverage by 2022. This is anticipated to support digital transformation in the economic, social, and government sectors catering to market growth.

Full Rack is Expected to Grow Significantly

- In Thailand, due to growing space scarcity between various companies, the full rack has a majority of the market share. In order to cope with increasing rack capacity due to the rapid growth of mobile broadband, e-commerce, and the increase in Big Data Analytics combined with cloud computing, it is necessary to build a fully rack-equipped data center.
- At first, there was a limited focus on rack space in data centers; only size and cost were taken into account during deployment. Nevertheless, there is an opportunity for increased use of rack space in the data center as more and more users from different sectors, such as online banking, telecommunications, media and entertainment, and others, are adopting applications with higher density.
- In the last few years, Thailand's businesses and consumers have also started to get into e-commerce. The country is fertile ground for e-commerce to grow as a significant source of the economy, with strong levels of mobile phone penetration, Mobile Banking, and Social Media use. The e-commerce sales reached USD 5.62 billion in 2022 from USD 3.94 billion in 2020, with a growth rate of around 9.17%.
- Companies increasingly rely on data centers for efficient management of their databases and storage, as they generate significant amounts of data every day. The main driving factor for data center rack usage is, therefore, the increased deployment of fully configured data centers. Also, the growth of the market is being influenced by the growing demand for IT services and investments made by large companies.

Thailand Data Center Rack Industry Overview

The upcoming DC construction projects in the country will likely increase the demand for Data Center Racks in the coming years. The market is moderately consolidated with a few major players, such as Schneider Electric SE, Rittal GMBH & Co.KG, Vertiv Group Corp., Eaton Corporation, and Delta Electronics (Thailand) PCL. Currently dominate the market. These major players with a prominent market share focus on expanding their customer base across the region.

In August 2023, ST Telemedia Global Data Centres (STT GDC) Thailand planned to build a third data center facility with an IT load capacity of 2MW and is expected to go live by the end of 2023.

In May 2023, Telehouse launched its first Thai data center in Bangkok, which was initiated in January 2022; the 9,000 sqm

(97,000 sq ft) facility offers 9.5MVA of capacity.

Additional Benefits:

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

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