

Africa Data Center Construction Market - Industry Outlook & Forecast 2024-2029

Market Report | 2024-04-23 | 318 pages | Arizton Advisory & Intelligence

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Report description:

The Africa data center construction market by investment is expected to grow at a CAGR of 13.08% from 2023 to 2029.

KEY HIGHLIGHTS

- In 2023, South Africa, Kenya, Nigeria, Egypt, Ethiopia, Morocco, Ghana, Algeria, and many others had an average internet penetration higher than 64%.
- The African government's support of digitalization and tax incentives in the region will improve the development of data centers and propel the growth of the Africa data center construction market. In South Africa and Kenya, the government has partnered with private entities to develop digital infrastructure, which increases the demand for data centers.
- 5G connectivity has been growing significantly in the market, and the network is available in over 18 countries, such as South Africa, Nigeria, Ethiopia, Gabon, Senegal, Egypt, Botswana, Zimbabwe, Madagascar, Uganda, Kenya, Lesotho, Seychelles, Mauritius, and others. The growing 5G environment will drive the requirement for establishing edge data centers in tier 2 & tier 3 locations for low latency and access to data at farther locations.
- Cloud-based services in the African region have been growing over the past years, with South Africa, Kenya, and Nigeria being the countries where most cloud deployments occur. For instance, in October 2023, Huawei planned to spend USD 430 million in the next five years to develop cloud computing infrastructure, support local software providers, and train digital professionals in Northern Africa.
- The industrial land for the development of data centers in the region has been growing over the years, with governments across several countries establishing special economic zones or free trade zones offering different types of support for development. For instance, the Kenya government has established several special economic zones, such as Greater Mombasa SEZ, Lamu SEZ, Dongo Kundu SEZ, Naivasha Industrial Park, and Kisumu SEZ.
- In Africa, data center providers use renewable energy to power data centers for sustainable data center operations. South Africa, Nigeria, Kenya, Egypt, Morocco, Ethiopia, and the Ivory Coast have witnessed renewable energy deployments. For instance, in February 2024, Teraco (Digital Realty) planned to develop a utility-scale solar PV energy facility in South Africa with a power capacity of around 120 MW.

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MARKETS TRENDS

Increasing Deployment of 5G Network Services

- Innovations in technology and deployment increase the demand for 5G in Africa. The deployment of 5G positively affects the demand for data centers and supports the growth of the Africa data center construction market. The increased data traffic, submarine cable connectivity, and smart cities' development have driven data center construction in the region with the increase in 5G applications.
- Telecom operators, such as MTN, Vodacom, Ethio Telecom Mascom, and Rain, have enabled 5G technology in some African countries on a trial basis and will launch commercial 5G services nationwide.
- African governments have taken the initiative to develop 5G in Africa. For instance, in July 2023, Ethio Telecom announced that it would expand the 5G network and service quality in Ethiopia to meet the demand of end users.

Growing Adoption of Renewable Energy

- Africa has a power outage, and governments across several countries have taken initiatives to strengthen power availability, such as increasing investments in renewable energy resources.
- In October 2023, the public investment corporation (PIC) of South Africa planned to invest USD 11.27 trillion in renewable energy projects to generate 200MW of electricity.
- In March 2023, Africa Data Centres and Distributed Power Africa signed a 20-year-long PPA for a 12 MW solar energy supply.
- In 2022, Eskom's 1,600-hectare land will be provided to the renewable energy company Mainstream Renewable Power as part of a lease agreement for the construction of facilities for the generation of renewable energy in Africa.
- The South African government implemented a carbon emission law that mandates the emitter to pay principles for significant emissions and should be offered incentives for adopting greener technology.
- The Nigerian government promotes clean energy technologies for sustainable start-ups and small and medium enterprises (SMEs). This move aims to address the country's environmental challenges by adopting the Global Clean Technology Innovation Program (GCIP)
- Egypt expects to increase the share of total electricity produced from renewable sources to 20% and 42%, respectively, by 2022 and 2035.

SEGMENTATION INSIGHTS

- In the African region, most Tier III facilities, UPS systems, are adopted as N+1 redundant systems, while other facilities have installations of N+N UPS systems.
- In 2023, most data centers in Africa were built with a power capacity of more than 15 MW. The construction of mega data center facilities will aid in power capacity growth across African data centers.
- The construction of data centers involves the participation of various parties, such as construction contractors, architectural and design firms, infrastructure providers, installation & commissioning service providers, and data center operators.
- The majority of the data centers in the African region are built based on ASHRAE guidelines. To increase the cooling infrastructure's efficiency, data centers give prime importance to PUE (Power Usage Effectiveness), WUE (Water Use Effectiveness), and Carbon Usage Effectiveness.

The report includes the investment in the following areas:

Infrastructure

- Electrical Infrastructure

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- Mechanical Infrastructure
- General Construction
- Electrical Infrastructure
- UPS Systems
- Generators
- Transfer Switches & Switchgear
- PDUs
- Other Electrical Infrastructure
- Mechanical Infrastructure
- Cooling Systems
- Racks
- Other Mechanical Infrastructure
- Cooling Systems
- CRAC and CRAH Units
- Chillers Units
- Cooling Towers, Condensers, & Dry Coolers
- Other Cooling Units
- Cooling Technique
- Air-based Cooling
- Liquid-based Cooling
- General Construction
- Core & Shell Development
- Installation & Commissioning Services
- Engineering & Building Design
- Fire Detection & Suppression
- Physical Security
- DCIM/BMS Solutions
- Tier Standards
- Tier I & Tier II
- Tier III
- Tier IV

GEOGRAPHICAL ANALYSIS

South Africa has significant investments in hyperscale and cloud data centers. Hyperscale operators, such as Amazon Web Services (AWS), Google Cloud Platform (GCP), Huawei Cloud, Oracle Cloud, and Microsoft Azure, have led the market regarding hyperscale investment and innovative technologies. The development of smart cities, special economic zones, free trade zones, government incentives, and exemptions fuels the growth of the Africa data center construction market. South Africa, Kenya, Morocco, Nigeria, Egypt, Ethiopia, and Ghana have been at the forefront of this development, as they have actively invested in smart city initiatives. For instance, in May 2023, the government of Kenya signed a memorandum of understanding with the Korean government to develop a Smart City in Kenya. Further, in 2023, South Africa, Nigeria, Egypt, Morocco, and Kenya were among the top countries with the highest colocation and hyperscale operator investments, and the trend is expected to continue.

Geography

- Africa
- South Africa

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- Kenya
- Nigeria
- Egypt
- Ethiopia
- Other African Countries

VENDOR ANALYSIS

Prominent Data Center Support Infrastructure Providers

- 4energy
- ABB
- Caterpillar
- Cummins
- Delta Electronics
- EATON
- EVAPCO
- Enlogic
- Legrand
- Master Power Technologies
- Rittal
- Rolls-Royce
- Schneider Electric
- Siemens
- STULZ
- Vertiv

Prominent Data Center Construction Contractors

- Abbeydale
- Advanced Vision Morocco
- ARSMAGNA
- Arup
- AtkinsRealis
- b2 Architects
- CAP DC
- Chess Enterprises
- Copy Cat Group
- Eastra Solutions
- Edarat Group
- EDS Engineers
- Egypro
- H&MV Engineering
- Ingenium
- Interkel
- LB Architects
- MWK Engineering

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- []Orascom Construction
- []REDCON Construction
- []Raya Network Services
- []Royal HaskoningDHV
- []Shaker Group
- []Sterling & Wilson
- []Summit Technology Solutions
- []Tri-Star Construction
- []United For Technology Solutions
- []Westwood Management

Data Center Investors

- []21st Century Technologies
- []Africa Data Centres
- []Airtel Africa
- []Digital Parks Africa
- []Digital Realty
- []Equinix
- []Galaxy Backbone
- []IXAFRICA DATA CENTRE
- []Medallion Communications
- []NTT DATA
- []Open Access Data Centres
- []Paratus Namibia
- []Rack Centre
- []Raxio Data Centres
- []Raya Data Center
- []Telecom Egypt
- []Vantage Data Centers
- []Wingu.Africa

New Entrants

- []Clouddoon
- []Kasi Cloud
- []Gulf Data Hub
- []Khazna Data Centers

KEY QUESTIONS ANSWERED:

- 1.[]What is the growth rate of the Africa data center construction market?
- 2.[]How big is the Africa data center construction market?
- 3.[]What is the estimated market size in terms of area in the Africa data center construction market by 2029?
- 4.[]How many MW of power capacity is expected to reach the Africa data center construction market by 2029?
- 5.[]What are the key trends in the Africa data center construction market?

Table of Contents:

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1. REPORT COVERAGE
 - 1.1. WHAT'S INCLUDED
 - 1.2. SEGMENTAL COVERAGE
 - 1.2.1. Market Segmentation by Infrastructure
 - 1.2.2. Market Segmentation by Electrical Infrastructure
 - 1.2.3. Market Segmentation by Mechanical Infrastructure
 - 1.2.4. Market Segmentation by Cooling System
 - 1.2.5. Market Segmentation by Cooling Techniques
 - 1.2.6. Market Segmentation by General Construction
 - 1.2.7. Market Segmentation by Tier Standards
2. MARKET AT A GLANCE
3. PREMIUM INSIGHTS
 - 3.1. KEY HIGHLIGHTS
 - 3.2. SEGMENTAL ANALYSIS
 - 3.3. MARKET TRENDS
 - 3.4. GEOGRAPHY ANALYSIS
4. INTRODUCTION
 - 4.1. INTERNET PENETRATION
 - 4.2. THE NETWORK READINESS INDEX
 - 4.2.1. Technology
 - 4.2.2. People
 - 4.2.3. Governance
 - 4.2.4. Impact
5. MARKET OPPORTUNITIES & TRENDS
 - 5.1. INCREASE IN SMART CITY INITIATIVES
 - 5.2. GOVERNMENT SUPPORT FOR DATA CENTER DEVELOPMENT
 - 5.3. ARTIFICIAL INTELLIGENCE ADOPTION LEADING INNOVATIONS IN DATA CENTER INFRASTRUCTURE
 - 5.4. MIGRATION FROM ON-PREMISES TO COLOCATION & MANAGED SERVICES
 - 5.5. RISE IN 5G NETWORK CONNECTIVITY AND EDGE DATA CENTER DEPLOYMENTS
6. MARKET GROWTH ENABLERS
 - 6.1. INCREASING ADOPTION OF CLOUD SERVICES
 - 6.2. GROWTH IN PENETRATION OF BIG DATA & IOT
 - 6.3. RISE IN RENEWABLE ENERGY ADOPTION
 - 6.4. INCREASE IN SUBMARINE CABLE & INLAND CONNECTIVITY
7. MARKET RESTRAINTS
 - 7.1. LOW BUDGETS & INVESTMENT CONSTRAINTS IN DATA CENTER DEVELOPMENT
 - 7.2. LOCATION CONSTRAINTS ON DATA CENTERS
 - 7.3. DEARTH OF SKILLED WORKFORCE
 - 7.4. SECURITY THREATS IN DATA CENTERS
8. MARKET LANDSCAPE
 - 8.1. MARKET OVERVIEW

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- 8.2. INVESTMENT: MARKET SIZE & FORECAST
- 8.3. AREA: MARKET SIZE & FORECAST
- 8.4. POWER CAPACITY: MARKET SIZE & FORECAST
- 8.5. SUPPORT INFRASTRUCTURE: MARKET SIZE & FORECAST

9. INFRASTRUCTURE

- 9.1. MARKET SNAPSHOT
- 9.2. KEY HIGHLIGHTS
- 9.3. ELECTRICAL INFRASTRUCTURE
 - 9.3.1. Market Overview
 - 9.3.2. Investment: Market Size & Forecast
- 9.4. MECHANICAL INFRASTRUCTURE
 - 9.4.1. Market Overview
 - 9.4.2. Investment: Market Size & Forecast
- 9.5. GENERAL CONSTRUCTION
 - 9.5.1. Market Overview
 - 9.5.2. Investment: Market Size & Forecast

10. ELECTRICAL INFRASTRUCTURE

- 10.1. MARKET SNAPSHOT
- 10.2. KEY HIGHLIGHTS
- 10.3. MARKET OVERVIEW
- 10.4. UPS SYSTEMS
 - 10.4.1. Market Overview
 - 10.4.2. Investment: Market Size & Forecast
- 10.5. GENERATORS
 - 10.5.1. Market Overview
 - 10.5.2. Investment: Market Size & Forecast
- 10.6. TRANSFER SWITCHES & SWITCHGEAR
 - 10.6.1. Market Overview
 - 10.6.2. Investment: Market Size & Forecast
- 10.7. PDUS
 - 10.7.1. Market Overview
 - 10.7.2. Investment: Market Size & Forecast
- 10.8. OTHER ELECTRICAL INFRASTRUCTURE
 - 10.8.1. Market Overview
 - 10.8.2. Investment: Market Size & Forecast

11. MECHANICAL INFRASTRUCTURE

- 11.1. MARKET SNAPSHOT
- 11.2. KEY HIGHLIGHTS
- 11.3. MARKET OVERVIEW
- 11.4. COOLING SYSTEMS
 - 11.4.1. Market Overview
 - 11.4.2. Investment: Market Size & Forecast
- 11.5. RACKS
 - 11.5.1. Market Overview

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- 11.5.2. Investment: Market Size & Forecast
- 11.6. OTHER MECHANICAL INFRASTRUCTURE
 - 11.6.1. Market Overview
 - 11.6.2. Investment: Market Size & Forecast
- 12. COOLING SYSTEMS
 - 12.1. MARKET SNAPSHOT
 - 12.2. KEY HIGHLIGHTS
 - 12.3. CRAC & CRAH UNITS
 - 12.3.1. Market Overview
 - 12.3.2. Investment: Market Size & Forecast
 - 12.4. CHILLER UNITS
 - 12.4.1. Market Overview
 - 12.4.2. Investment: Market Size & Forecast
 - 12.5. COOLING TOWERS, CONDENSERS, & DRY COOLERS
 - 12.5.1. Market Overview
 - 12.5.2. Investment: Market Size & Forecast
 - 12.6. OTHER COOLING UNITS
 - 12.6.1. Market Overview
 - 12.6.2. Investment: Market Size & Forecast
- 13. COOLING TECHNIQUE
 - 13.1. MARKET SNAPSHOT
 - 13.2. KEY HIGHLIGHTS
 - 13.3. MARKET OVERVIEW
 - 13.4. AIR-BASED COOLING
 - 13.4.1. Market Overview
 - 13.4.2. Investment: Market Size & Forecast
 - 13.5. LIQUID-BASED COOLING
 - 13.5.1. Market Overview
 - 13.5.2. Investment: Market Size & Forecast
- 14. GENERAL CONSTRUCTION
 - 14.1. MARKET SNAPSHOT
 - 14.2. KEY HIGHLIGHTS
 - 14.3. MARKET OVERVIEW
 - 14.4. CORE & SHELL DEVELOPMENT
 - 14.4.1. Market Overview
 - 14.4.2. Investment: Market Size & Forecast
 - 14.5. INSTALLATION & COMMISSIONING SERVICES
 - 14.5.1. Market Overview
 - 14.5.2. Investment: Market Size & Forecast
 - 14.6. ENGINEERING & BUILDING DESIGN
 - 14.6.1. Market Overview
 - 14.6.2. Investment: Market Size & Forecast
 - 14.7. FIRE DETECTION & SUPPRESSION
 - 14.7.1. Market Overview

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- 14.7.2. Investment: Market Size & Forecast
- 14.8. PHYSICAL SECURITY
 - 14.8.1. Market Overview
 - 14.8.2. Investment: Market Size & Forecast
- 14.9. DCIM/BMS SOLUTIONS
 - 14.9.1. Market Overview
 - 14.9.2. Investment: Market Size & Forecast
- 15. TIER STANDARDS
 - 15.1. MARKET SNAPSHOT
 - 15.2. KEY HIGHLIGHTS
 - 15.3. MARKET OVERVIEW
 - 15.4. TIER I & II
 - 15.4.1. Market Overview
 - 15.4.2. Investment: Market Size & Forecast
 - 15.5. TIER III
 - 15.5.1. Market Overview
 - 15.5.2. Investment: Market Size & Forecast
 - 15.6. TIER IV
 - 15.6.1. Market Overview
 - 15.6.2. Investment: Market Size & Forecast
- 16. GEOGRAPHIC SEGMENTATION
 - 16.1. SOUTH AFRICA
 - 16.1.1. Market Overview
 - 16.1.2. Investment: Market Size & Forecast
 - 16.1.3. Area: Market Size & Forecast
 - 16.1.4. Power Capacity: Market Size & Forecast
 - 16.1.5. Support Infrastructure: Market Size & Forecast
 - 16.2. KENYA
 - 16.2.1. Market Overview
 - 16.2.2. Investment: Market Size & Forecast
 - 16.2.3. Area: Market Size & Forecast
 - 16.2.4. Power Capacity: Market Size & Forecast
 - 16.2.5. Support Infrastructure: Market Size & Forecast
 - 16.3. NIGERIA
 - 16.3.1. Market Overview
 - 16.3.2. Investment: Market Size & Forecast
 - 16.3.3. Area: Market Size & Forecast
 - 16.3.4. Power Capacity: Market Size & Forecast
 - 16.3.5. Support Infrastructure: Market Size & Forecast
 - 16.4. EGYPT
 - 16.4.1. Market Overview
 - 16.4.2. Investment: Market Size & Forecast
 - 16.4.3. Area: Market Size & Forecast
 - 16.4.4. Power Capacity: Market Size & Forecast
 - 16.4.5. Support Infrastructure: Market Size & Forecast

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- 16.5. ETHIOPIA
 - 16.5.1. Market Overview
 - 16.5.2. Investment: Market Size & Forecast
 - 16.5.3. Area: Market Size & Forecast
 - 16.5.4. Power Capacity: Market Size & Forecast
 - 16.5.5. Support Infrastructure: Market Size & Forecast
- 16.6. OTHER AFRICAN COUNTRIES
 - 16.6.1. Market Overview
 - 16.6.2. Investment: Market Size & Forecast
 - 16.6.3. Area: Market Size & Forecast
 - 16.6.4. Power Capacity: Market Size & Forecast
 - 16.6.5. Support Infrastructure: Market Size & Forecast
- 17. COMPETITIVE LANDSCAPE
 - 17.1. ELECTRICAL INFRASTRUCTURE
 - 17.2. MECHANICAL INFRASTRUCTURE
 - 17.3. GENERAL CONSTRUCTION
 - 17.4. DATA CENTER INVESTORS
- 18. PROMINENT DATA CENTER SUPPORT INFRASTRUCTURE PROVIDERS
 - 18.1. 4ENERGY
 - 18.1.1. Business Overview
 - 18.1.2. Product Offerings
 - 18.2. ABB
 - 18.2.1. Business Overview
 - 18.2.2. Product Offerings
 - 18.3. CATERPILLAR
 - 18.3.1. Business Overview
 - 18.3.2. Product Offerings
 - 18.4. CUMMINS
 - 18.4.1. Business Overview
 - 18.4.2. Product Offerings
 - 18.5. DELTA ELECTRONICS
 - 18.5.1. Business Overview
 - 18.5.2. Product Offerings
 - 18.6. EATON
 - 18.6.1. Business Overview
 - 18.6.2. Product Offerings
 - 18.7. EVAPCO
 - 18.7.1. Business Overview
 - 18.7.2. Product Offerings
 - 18.8. ENLOGIC
 - 18.8.1. Business Overview
 - 18.8.2. Product Offerings
 - 18.9. LEGRAND
 - 18.9.1. Business Overview
 - 18.9.2. Product Offerings

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18.10. MASTER POWER TECHNOLOGIE

18.10.1. Business Overview

18.10.2. Product Offerings

18.11. RITTAL

18.11.1. Business Overview

18.11.2. Product Offerings

18.12. ROLLS-ROYCE

18.12.1. Business Overview

18.12.2. Product Offerings

18.13. SCHNEIDER ELECTRIC

18.13.1. Business Overview

18.13.2. Product Offerings

18.14. SIEMENS

18.14.1. Business Overview

18.14.2. Product Offerings

18.15. STULZ

18.15.1. Business Overview

18.15.2. Product Offerings

18.16. VERTIV

18.16.1. Business Overview

18.16.2. Product Offerings

19. PROMINENT DATA CENTER CONSTRUCTION CONTRACTORS

19.1. ABBEYDALE

19.1.1. Business Overview

19.1.2. Service Offerings

19.2. ADVANCED VISION MOROCCO

19.2.1. Business Overview

19.2.2. Service Offerings

19.3. ARSMAGNA

19.3.1. Business Overview

19.3.2. Service Offerings

19.4. ARUP

19.4.1. Business Overview

19.4.2. Service Offerings

19.5. AtkinsRealis

19.5.1. Business Overview

19.5.2. Service Offerings

19.6. B2 ARCHITECTS

19.6.1. Business Overview

19.6.2. Service Offerings

19.7. CAP DC

19.7.1. Business Overview

19.7.2. Service Offerings

19.8. CHESS ENTERPRISES

19.8.1. Business Overview

19.8.2. Service Offerings

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- 19.9. COPY CAT GROUP
 - 19.9.1. Business Overview
 - 19.9.2. Service Offerings
- 19.10. EASTRA SOLUTIONS
 - 19.10.1. Business Overview
 - 19.10.2. Service Offerings
- 19.11. EDARAT GROUP
 - 19.11.1. Business Overview
 - 19.11.2. Service Offerings
- 19.12. EDS ENGINEERS
 - 19.12.1. Business Overview
 - 19.12.2. Service Offerings
- 19.13. EGYPRO
 - 19.13.1. Business Overview
 - 19.13.2. Service Offerings
- 19.14. H&MV ENGINEERING
 - 19.14.1. Business Overview
 - 19.14.2. Service Offerings
- 19.15. INGENIUM
 - 19.15.1. Business Overview
 - 19.15.2. Service Offerings
- 19.16. INTERKEL
 - 19.16.1. Business Overview
 - 19.16.2. Service Offerings
- 19.17. JLB ARCHITECTS
 - 19.17.1. Business Overview
 - 19.17.2. Service Offerings
- 19.18. MWK ENGINEERING
 - 19.18.1. Business Overview
 - 19.18.2. Service Offerings
- 19.19. ORASCOM CONSTRUCTION
 - 19.19.1. Business Overview
 - 19.19.2. Service Offerings
- 19.20. REDCON CONSTRUCTION
 - 19.20.1. Business Overview
 - 19.20.2. Service Offerings
- 19.21. RAYA NETWORK SERVICES
 - 19.21.1. Business Overview
 - 19.21.2. Service Offerings
- 19.22. ROYAL HASKONINGDHV
 - 19.22.1. Business Overview
 - 19.22.2. Service Offerings
- 19.23. SHAKER GROUP
 - 19.23.1. Business Overview
 - 19.23.2. Service Offerings
- 19.24. STERLING & WILSON
 - 19.24.1. Business Overview

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- 19.24.2. Service Offerings
- 19.25. SUMMIT TECHNOLOGY SOLUTIONS
 - 19.25.1. Business Overview
 - 19.25.2. Service Offerings
- 19.26. TRI-STAR CONSTRUCTION
 - 19.26.1. Business Overview
 - 19.26.2. Service Offerings
- 19.27. UNITED FOR TECHNOLOGY SOLUTIONS
 - 19.27.1. Business Overview
 - 19.27.2. Service Offerings
- 19.28. WESTWOOD MANAGEMENT
 - 19.28.1. Business Overview
 - 19.28.2. Service Offerings

- 20. DATA CENTER INVESTORS
 - 20.1. 21ST CENTURY TECHNOLOGIES
 - 20.1.1. Business Overview
 - 20.1.2. Service Offerings
 - 20.2. AFRICA DATA CENTRES
 - 20.2.1. Business Overview
 - 20.2.2. Service Offerings
 - 20.3. AIRTEL AFRICA
 - 20.3.1. Business Overview
 - 20.3.2. Service Offerings
 - 20.4. DIGITAL PARKS AFRICA
 - 20.4.1. Business Overview
 - 20.4.2. Service Offerings
 - 20.5. DIGITAL REALTY
 - 20.5.1. Business Overview
 - 20.5.2. Service Offerings
 - 20.6. EQUINIX
 - 20.6.1. Business Overview
 - 20.6.2. Service Offerings
 - 20.7. GALAXY BACKBONE
 - 20.7.1. Business Overview
 - 20.7.2. Service Offerings
 - 20.8. IXAFRICA DATA CENTRE
 - 20.8.1. Business Overview
 - 20.8.2. Service Offerings
 - 20.9. MEDALLION COMMUNICATIONS
 - 20.9.1. Business Overview
 - 20.9.2. Service Offerings
 - 20.10. NTT DATA
 - 20.10.1. Business Overview
 - 20.10.2. Service Offerings
 - 20.11. OPEN ACCESS DATA CENTERS
 - 20.11.1. Business Overview

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- 20.11.2. Service Offerings
- 20.12. PARATUS NAMIBIA
 - 20.12.1. Business Overview
 - 20.12.2. Service Offerings
- 20.13. RACK CENTRE
 - 20.13.1. Business Overview
 - 20.13.2. Service Offerings
- 20.14. RAXIO DATA CENTRES
 - 20.14.1. Business Overview
 - 20.14.2. Service Offerings
- 20.15. RAYA DATA CENTER
 - 20.15.1. Business Overview
 - 20.15.2. Service Offerings
- 20.16. TELECOM EGYPT
 - 20.16.1. Business Overview
 - 20.16.2. Service Offerings
- 20.17. VANTAGE DATA CENTERS
 - 20.17.1. Business Overview
 - 20.17.2. Service Offerings
- 20.18. WINGU.AFRICA
 - 20.18.1. Business Overview
 - 20.18.2. Service Offerings

- 21. NEW ENTRANTS
 - 21.1. CLOUDOON
 - 21.1.1. Business Overview
 - 21.1.2. Service Offerings
 - 21.2. KASI CLOUD
 - 21.2.1. Business Overview
 - 21.2.2. Service Offerings
 - 21.3. GULF DATA HUB
 - 21.3.1. Business Overview
 - 21.3.2. Service Offerings
 - 21.4. KHAZNA DATA CENTERS
 - 21.4.1. Business Overview
 - 21.4.2. Service Offerings

- 22. QUANTITATIVE SUMMARY
 - 22.1.1. Investment: Market Size & Forecast
 - 22.1.2. Infrastructure: Market Size & Forecast
- 22.2. MARKET SEGMENTATION
 - 22.2.1. Electrical Infrastructure: Market Size & Forecast
 - 22.2.2. Mechanical Infrastructure: Market Size & Forecast
 - 22.2.3. Cooling Systems: Market Size & Forecast
 - 22.2.4. Cooling Techniques: Market Size & Forecast
 - 22.2.5. General Construction: Market Size & Forecast
 - 22.2.6. Tier Standards: Market Size & Forecast

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- 22.3. MARKET BY GEOGRAPHY
 - 22.3.1. Investment: Market Size & Forecast
 - 22.3.2. Area: Market Size & Forecast
 - 22.3.3. Power Capacity: Market Size & Forecast
- 22.4. SOUTH AFRICA
 - 22.4.1. Investment: Market Size & Forecast
 - 22.4.2. Infrastructure: Market Size & Forecast
- 22.5. KENYA
 - 22.5.1. Investment: Market Size & Forecast
 - 22.5.2. Infrastructure: Market Size & Forecast
- 22.6. NIGERIA
 - 22.6.1. Investment: Market Size & Forecast
 - 22.6.2. Infrastructure: Market Size & Forecast
- 22.7. EGYPT
 - 22.7.1. Investment: Market Size & Forecast
 - 22.7.2. Infrastructure: Market Size & Forecast
- 22.8. ETHIOPIA
 - 22.8.1. Investment: Market Size & Forecast
 - 22.8.2. Infrastructure: Market Size & Forecast
- 22.9. OTHER AFRICAN COUNTRIES
 - 22.9.1. Investment: Market Size & Forecast
 - 22.9.2. Infrastructure: Market Size & Forecast

23. APPENDIX

- 23.1. LIST OF ABBREVIATIONS
- 23.2. CURRENCY CONVERSION

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