Malaysia Data Center Market - Investment Analysis & Growth Opportunity 2024-2029

Market Report | 2024-04-23 | 160 pages | Arizton Advisory & Intelligence

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Report description:

The Malaysia data center market is expected to grow at a CAGR of 13.92% from 2023-2029.

KEY HIGHLIGHTS

-The Malaysia data center market has about 34 operational colocation data centers. Most colocation data centers are being developed according to Tier III standards. For instance, NTT DATA's Cyberjaya is designed and constructed per Tier III standards and certified by the Uptime Institute.
-Malaysia is among the top expensive markets globally for developing data centers. In 2023, its data center construction cost stood at about $8.5-$10 million per MW, making it the costliest market in the APAC region after Singapore and Jakarta.
-Some leading colocation operators in the Malaysian data center industry include Bridge Data Centres, NTT DATA, Keppel Data Centres, Vantage Data Centers, VADS, and GDS Services. Some new entrants in the market include AirTrunk, Equinix, EdgeConneX, Princeton Digital Group, NEXTDC, ST Telemedia Global Data Centres, and others.
-Several factors are driving industrial development in Kuala Lumpur. For instance, the administration has established the Kuala Lumpur Smart City Master Plan 2020-2025 to support innovations and the sustainable development of the city's industrial infrastructure, with targets such as smart digital infrastructure and smart economy.
-In January 2024, the governments of Malaysia and Singapore signed an MoU to jointly develop a Special Economic Zone (SEZ) in the Malaysian state of Johor. This will help facilitate better cross-border movement of people and goods, increase the adoption of renewable energy, and make business regulations more effective.
-The upcoming Sedenak Tech Park in Johor offers various advantages, such as using renewable energy for its power needs, the low risk of natural disasters, large land availability, highly skilled talent, and government support. This will further bolster data center developments in the Malaysia data center market.

WHY SHOULD YOU BUY THIS RESEARCH?

-Market size regarding investment, area, power capacity, and Malaysia colocation market revenue is available.

-An assessment of the data center investment in Malaysia 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 Malaysia data center market landscape, an in-depth market analysis, and insightful predictions about market size during the forecast period.
-Snapshot of existing and upcoming third-party data center facilities in Malaysia
o Facilities Covered (Existing): 34
o Facilities Identified (Upcoming): 33
o Coverage: 9 Locations
o Existing vs. Upcoming (Area)
o Existing vs. Upcoming (IT Load Capacity)
-Data Center Colocation Market in Malaysia
o Colocation Market Revenue & Forecast (2023-2029)
o Wholesale vs. Retail Colocation Revenue (2023-2029)
o Retail Colocation Pricing
o Wholesale Colocation Pricing
-The Malaysia 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 industry.
-A transparent research methodology and the analysis of the demand and supply aspects of the industry.

VENDOR LANDSCAPE

-Bride Data Centers, Keppel Data Centres, NTT DATA, Vantage Data Centers, and Open DC are some of the key colocation investors in the Malaysia data center market in 2023.
-Malaysia's cloud market is set to expand, with the three hyperscale tech giants (Amazon Web Services, Google, and Microsoft) planning to launch their cloud regions in Kuala Lumpur. Each cloud region will account for three availability zones.
-Malaysia is witnessing investments from colocation and hyperscale operators developing their data center facilities. For instance, Microsoft is involved in developing its first self-built data center region in Greater Kuala Lumpur, which is likely to be online in the next 1-2 years.

IT Infrastructure Providers

-Cisco Systems
-Dell Technologies
-Fujitsu
-Hewlett Packard Enterprise
-Huawei Technologies
-IBM
-Inspur
-Lenovo
-NetApp

Data Center Construction Contractors & Sub-Contractors

-Advance Power Engineering
-Asima Architects
-AVO Technology
-B-Global Tech
-CTC-Global
-CSF Group
-Cyclect Group
-DSCO Group
-Gamuda
-GCM Technologies
-HSS Engineers
-ISG
-Kienta Engineering Construction
-LSK Engineering
-MES Group
-M+W Group (Exyte)
-MN Holdings
-Nakano
-NTT FACILITIES
-Powerware Systems
-S5 Engineering
-Shaw Architect
-Sunway Construction Group
-Unique Central

Support Infrastructure Providers

-ABB
-Caterpillar
-Cummins
-Eaton
-Fuji Electric
-HITEC Power Protection
-KOHLER Power
-Legrand
-Mitsubishi Electric
-Narada Power Source
-Piller Power Systems
-Rittal
-Rolls-Royce
-Schneider Electric
-Siemens
-Socomec
-STULZ
-Trane
-Vertiv

Data Center Investors

-Bridge Data Centres
-Edge Centres
-GDS Services
-IRIX (PP TELECOMMUNICATION)
-Keppel Data Centres
-NTT DATA
-Open DC
-TM One
-Vantage Data Centers
-YTL Data Center Holdings

New Entrants

-AirTrunk
-Amazon Web Services (AWS)
-EdgeConneX
-Equinix
-FutureData (Cyclect Group + TSG Group)
-Google
-i-Berhad
-Infinaxis Data Centre Holdings
-MN Holdings + Shanghai DC-Science
-Microsoft
-NEXTDC
-Princeton Digital Group
-Regal Orion
-Singtel
-ST Telemedia Global Data Centres
-Yondr

EXISTING VS. UPCOMING DATA CENTERS

-Existing Facilities in the Region (Area and Power Capacity)
oSelangor (Kuala Lumpur & Cyberjaya)
oJohor (Johor Bahru)
oOther States
-List of Upcoming Facilities in the Region (Area and Power Capacity)
oSelangor (Kuala Lumpur & Cyberjaya)
oJohor (Johor Bahru)
oOther States

REPORT COVERAGE:

This report analyses the Malaysia 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
oServers
oStorage Systems
oNetwork Infrastructure
-Electrical Infrastructure
oUPS Systems
oGenerators
oSwitches & Switchgears
oPDUs
oOther Electrical Infrastructure
-Mechanical Infrastructure
oCooling Systems
oRack Cabinets
oOther Mechanical Infrastructure
-Cooling Systems
oCRAC and CRAH
oChillers
oCooling Tower and Dry Coolers
oOther Cooling Units
-General Construction
oCore & Shell Development
oInstallation & Commissioning Services
oBuilding & Engineering Design
oFire Detection & Suppression Systems
oPhysical Security
oData Center Infrastructure Management (DCIM)
-Tier Standard
oTier I & Tier II
oTier III
oTier IV
-Geography
oSelangor
oJohor
oOther States

KEY QUESTIONS ANSWERED:

1.What factors are driving the Malaysian data center industry?
2.How big is the Malaysia data center market?
3.How many MW of power capacity will be added across Malaysia during 2024 to 2029?
4.What is the growth rate of the Malaysia data center market?
5.Which states are included in the Malaysia data center market report?

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