

Japan Data Center Market - Investment Analysis & Growth Opportunities 2024-2029

Market Report | 2024-05-16 | 173 pages | Arizton Advisory & Intelligence

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Report description:

The Japan data center market will witness investments of USD 14.48 billion by 2029, growing at a CAGR of 6.88% during the forecast period.

KEY HIGHLIGHTS

- Japan has around 107 operational colocation data centers, most of which are being developed according to Tier III standards. The Japan data center market has the presence of some local and global operators, such as AirTrunk, AT TOKYO, Colt Data Centre Services, Digital Edge, Equinix, Fujitsu, IDC Frontier, Internet Initiative Japan (IIJ), MC Digital Realty, NTT Communications, SCSK Corporation (NETXDC), Telehouse, and others.
- Japan's Ministry of Economy, Trade, and Industry announced that more than 100 regional governments have shown interest in hosting new data centers and planning to decentralize data centers. The regions offered as new data center locations include Uki City, Yoshinogari Town, Tottori City, and Nogata City.
- Japan's average construction cost per watt ranges between \$10 and \$11. The cost is between \$10 million and \$11 million per MW, likely increasing by 5%- 7% YoY.
- GLP, the logistics real estate firm based in the APAC region, is among Japan's data center market's new entrants. The company launched Ada Infrastructure, a new data center platform, and planned to invest over USD 10 billion (1.5 trillion yen) over the next five years to develop data centers across Japan.
- The deployment of 5G networks will boost the region's digital economy and lead to a higher demand for high-bandwidth networking infrastructure. Owing to smart city initiatives carried out by government agencies, the adoption of software-defined networking (SDN) is likely to increase.

WHY SHOULD YOU BUY THIS RESEARCH?

- Market size is available in terms of investment, area, power capacity, and Japan colocation market revenue.
- An assessment of the data center investment in Japan by colocation, hyperscale, and enterprise operators.

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- Investments in the area (square feet) and power capacity (MW) across cities in the country.
- A detailed study of the existing Japan data center market landscape, an in-depth market analysis, and insightful predictions about industry size during the forecast period.
- Snapshot of existing and upcoming third-party data center facilities in Japan
 - o□ Facilities Covered (Existing): 107
 - o□ Facilities Identified (Upcoming): 41
 - o□ Coverage: 17+ Cities
 - o□ Existing vs. Upcoming (Area)
 - o□ Existing vs. Upcoming (IT Load Capacity)
- Data Center Colocation Market in the Japan
 - o□ Colocation Market Revenue & Forecast (2023-2029)
 - o□ Wholesale vs. Retail Colocation Revenue (2023-2029)
 - o□ Retail Colocation Pricing
 - o□ Wholesale Colocation Pricing
- The Japan data center market investments are classified into IT, power, cooling, and general construction services with sizing and forecast.
- This report comprehensively analyzes the industry's latest trends, growth rate, potential opportunities, growth restraints, and prospects.
- This section provides a business overview and product offerings of prominent IT infrastructure providers, construction contractors, support infrastructure providers, and investors in the industry.
- A transparent research methodology and the analysis of the demand and supply aspects of the industry.

VENDOR LANDSCAPE

- Some of the key investors in the Japan data center market are AirTrunk, AT TOKYO, Colt Data Centre Services, Digital Edge, Equinix, Goodman, Princeton Digital Group, MC Digital Realty, NTT Communications, Vantage Data Centers, ST Telemedia Global Data Centres, STACK Infrastructure and others.
- Hyperscalers are building their self-built data centers in partnership with real estate developers, which is estimated to impact the industry for colocation providers. For instance, in March 2023, Google announced the launch of its first self-built data center facility in the Inzai area of Greater Tokyo.
- In January 2024, Amazon Web Services plans to invest USD 15.2 billion in Japan to enhance its cloud computing infrastructure by 2027. The company aims to expand its data center facilities in both Tokyo and Osaka
- IT Infrastructure Providers
 - o□ Arista Networks
 - o□ Atos
 - o□ Broadcom
 - o□ Cisco Systems
 - o□ Dell Technologies
 - o□ Fujitsu
 - o□ Hewlett Packard Enterprise (HPE)
 - o□ Hitachi Vantara
 - o□ Huawei Technologies
 - o□ IBM
 - o□ Inspur
 - o□ Lenovo
 - o□ NEC

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o NetApp

o Oracle

- Data Center Construction Contractors & Sub-Contractors

o Arup

o AECOM

o Daiwa House Industry

o Fuji Furukawa Engineering & Construction

o Hibiya Engineering

o ISG

o Kajima Corporation

o Keihanshin Building

o Linesight

o MARCAI DESIGN

o Meiho Facility Works

o Nikken Sekkei

o NTT FACILITIES

o Obayashi Corporation

o SHINRYO Corporation

o TAISEI Corporation

- Support Infrastructure Providers

o 3M

o ABB

o Alfa Laval

o Caterpillar

o Cummins

o Delta Electronics

o Eaton

o Fuji Electric

o HITEC Power Protection

o Johnson Controls

o Kawasaki Heavy Industries

o KOHLER-SDMO

o Legrand

o Mitsubishi Electric

o Rittal

o Rolls-Royce

o Schneider Electric

o STULZ

o Siemens

o Vertiv

- Data Center Investors

o AirTrunk

o Alibaba Cloud

o Amazon Web Services

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- o AT TOKYO
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- o Equinix
- o Fujitsu
- o Goodman
- o Google
- o IDC Frontier
- o Internet Initiative Japan (IIJ)
- o MC Digital Realty
- o Microsoft
- o NTT Communications
- o SCSK Corporation (NETXDC)
- o Telehouse
- o Tencent Cloud
- o TIS INTEC Group

- New Entrants
 - o Ada Infrastructure
 - o Edge Centres
 - o CyrusOne
 - o ESR
 - o GDS Services
 - o Keppel Data Centres
 - o NEXTDC
 - o Princeton Digital Group (PDG)
 - o SC Zeus Data Center
 - o STACK Infrastructure
 - o ST Telemedia Global Data Centres
 - o Vantage Data Centers
 - o Yondr

EXISTING VS. UPCOMING DATA CENTERS

- Existing Facilities in the Region (Area and Power Capacity)
 - o Tokyo
 - o Osaka
 - o Other Cities
- List of Upcoming Facilities in the Region (Area and Power Capacity)
 - o Tokyo
 - o Osaka
 - o Other Cities

REPORT COVERAGE:

This report analyses the Japan 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

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investment estimation for different segments. The segmentation includes:

- IT Infrastructure
 - oServers
 - oStorage Systems
 - oNetwork Infrastructure
- Electrical Infrastructure
 - oUPS Systems
 - oGenerators
 - oTransfer Switches & Switchgears
 - oPDUs
 - oOther Electrical Infrastructure
- Mechanical Infrastructure
 - oCooling Systems
 - oRack Cabinets
 - oOther Mechanical Infrastructure
- Cooling Systems
 - oCRAC & CRAH Units
 - oChiller Units
 - oCooling Towers, Condensers & Dry Coolers
 - oEconomizers & Evaporative Coolers
 - oOther Cooling Units
- General Construction
 - oCore & Shell Development
 - oInstallation & Commissioning Services
 - oEngineering & Building Design
 - oFire Detection & Suppression Systems
 - oPhysical Security
 - oData Center Infrastructure Management (DCIM)
- Tier Standard
 - oTier I & Tier II
 - oTier III
 - oTier IV
- Geography
 - oTokyo
 - oOsaka
 - oOther Cities

KEY QUESTIONS ANSWERED:

1. What factors are driving the Japan data center market?
2. How much MW of power capacity will be added across Japan during 2024-2029?
3. What is the growth rate of the Japan data center market?
4. How many existing and upcoming data center facilities exist in Japan?
5. How big is the Japan data center market?
6. Who are the key investors in the Japan data center market?

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