

## **Singapore Data Center Market - Investment Analysis & Growth Opportunities 2024-2029**

Market Report | 2024-05-16 | 118 pages | Arizton Advisory & Intelligence

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### **Report description:**

The Singapore data center market by investments is expected to grow at a CAGR of 8.35% from 2023 to 2029.

### **KEY HIGHLIGHTS**

- Digital Realty, NTT Global Data Centers, Equinix, AirTrunk, BDx, Global Switch, Iron Mountain, Keppel Data Centres, Princeton Digital Group, and ST Telemedia Global Data Centres are some of the major colocation operators operating in the Singapore data center market.
- The moratorium on the data center construction was lifted in 2022. In July 2023, IMDA and Singapore EDB selected around four operators for data center development with a power capacity of around 80 MW through a DC-CFA exercise.
- The Singapore data center market has strong fiber connectivity, with around 25 submarine cables and thirteen upcoming submarine cables connecting Singapore to major global markets.
- Some data center operators have taken initiatives to move toward sustainability. For instance, Singapore's Energy Market Authority (EMA) approved Keppel Corporation's import of one GW of renewable power from Cambodia.
- The government of Singapore has established several free trade zones (FTZs) that offer businesses custom and tax concessions. Tanjong Pagar Terminal and Keppel Terminal, Keppel Distripark, Keppel Distripark Linkbridge, Pasir Panjang Terminal, and Jurong Port are only a few FTZs in Singapore.
- Singapore's regulatory bodies have set minimum requirements for data centers to prioritize safety, security, and data integrity. Organizations intending to establish data centers in the country must adhere to these standards, meeting audit testing to ensure compliance.

### **WHY SHOULD YOU BUY THIS RESEARCH?**

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- Market size regarding investment, area, power capacity, and Singapore colocation market revenue is available.
- An assessment of the data center investment in Singapore by colocation, hyperscale, and enterprise operators.
- Investments in the area (square feet) and power capacity (MW) across regions in the country.
- A detailed study of the existing Singapore 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 Singapore
- I.□Facilities Covered (Existing): 41
- II.□Facilities Identified (Upcoming): 5
- III.□Coverage: 3+ Region
- IV.□Existing vs. Upcoming (Area)
- V.□Existing vs. Upcoming (IT Load Capacity)
- Data Center Colocation Market in the Singapore
- I.□Colocation Market Revenue & Forecast (2023-2029)
- II.□Retail vs Wholesale Colocation Revenue & Forecast (2023-2029)
- III.□Retail & Wholesale Colocation Pricing
- The Singapore 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.
- Provide a business overview and product offerings of prominent IT infrastructure providers, construction contractors, support infrastructure providers, and investors operating in the market.
- A transparent research methodology and the analysis of the demand and supply aspects of the market.

## VENDOR LANDSCAPE

- Singapore is one of the world's prominent locations in terms of technological advancements. The Singapore data center market hosts several global IT infrastructure providers, such as Atos, Arista Networks, Broadcom, Cisco Systems, NetApp, Juniper Networks, etc.
- Global construction contracts have a strong presence in the Singapore data center market and have offered their services to multiple customers over the years. For instance, Aurecon built Global Switch Woodlands' Singapore data center facility.

## IT Infrastructure Providers

- Arista Networks
- Atos
- Broadcom
- Cisco Systems
- Dell Technologies
- Hewlett Packard Enterprise
- Huawei Technologies
- IBM
- Inspur
- Juniper Networks
- Lenovo
- MiTAC Holdings

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- [NetApp
- [Quanta Cloud Technology
- [Wiwynn

#### Data Center Construction Contractors & Sub-Contractors

- [AECOM
- [Arup
- [AtkinsRealis
- [Aurecon
- [AWP Architects
- [Cundall
- [DSCO Group
- [Fortis Construction
- [Gammon Construction
- [Kienta Engineering Construction
- [LSK Engineering
- [M+W Group
- [NTT Facilities
- [PM Group
- [Sato Kogyo

#### Support Infrastructure Providers

- [ABB
- [Airedale
- [Bosch Security Systems
- [Caterpillar
- [Cummins
- [Eaton
- [Fuji Electric
- [HITEC Power Protection
- [Kohler SDMO
- [Legrand
- [Mitsubishi Electric
- [Piller Power Systems
- [Rittal
- [Rolls-Royce
- [Schneider Electric
- [STULZ
- [Vertiv

#### Data Center Investors

- [AirTrunk
- [Amazon Web Services
- [China Mobile

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- Digital Realty
- Empyrion DC
- Equinix
- Facebook (Meta)
- Google
- Global Switch
- Iron Mountain
- Keppel Data Centres
- Microsoft
- NTT Data
- Princeton Digital Group
- Singtel
- ST Telemedia Global Data Centres
- Telin Singapore

#### EXISTING VS. UPCOMING DATA CENTERS

- Existing Facilities in the Region (Area and Power Capacity)
  - o Eastern Singapore
  - o Southern Singapore
  - o Northern Singapore
- List of Upcoming Facilities in the Region (Area and Power Capacity)
  - o Eastern Singapore
  - o Southern Singapore
  - o Northern Singapore

#### REPORT COVERAGE:

This report analyses the Singapore 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
  - o Servers
  - o Storage Systems
  - o Network Infrastructure
- Electrical Infrastructure
  - o UPS Systems
  - o Generators
  - o Transfer Switches & Switchgears
  - o PDUs
  - o Other Electrical Infrastructure
- Mechanical Infrastructure
  - o Cooling Systems
  - o Rack Cabinets
  - o Other Mechanical Infrastructure
- Cooling Systems

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- o CRAC & CRAH Units
- o Chiller Units
- o Cooling Towers, Condensers & Dry Coolers
- o Other Cooling Units
- General Construction
- o Core & Shell Development
- o Installation & Commissioning Services
- o Engineering & Building Design
- o Fire Detection & Suppression Systems
- o Physical Security
- o Data Center Infrastructure Management (DCIM)
- Tier Standard
- o Tier I & Tier II
- o Tier III
- o Tier IV

#### KEY QUESTIONS ANSWERED:

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

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