SCOTTS INTERNATIONAL

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

Market Report | 2024-06-20 | 569 pages | Arizton Advisory & Intelligence

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Report description:

The APAC data center construction market by investment is expected to grow at a CAGR of 10.28% from 2023 to 2029.

KEY HIGHLIGHTS

- The APAC data center construction market is experiencing significant growth, fueled by government support for data center development, rapid advances in submarine cable connectivity, investments from cloud and technology service providers, and a surge in the adoption of artificial intelligence as a part of digitalization initiatives by businesses across APAC.
- China currently leads the APAC data center construction market regarding power capacity. India, Japan, Malaysia, Australia, and Indonesia are key contributors to capacity growth in the area. Additionally, we can expect increased investment activities in Vietnam, Thailand, the Philippines, South Korea, and New Zealand throughout the forecast period.
- The APAC data center construction market experienced substantial investments from key players such as Airtrunk, NTT DATA, AWS, Equinix, GDS Services, and Keppel Data Centers. The total announced investments exceeded USD 10 billion.
- Governments and data center operators are increasingly interested in integrating renewable energy. Governments across the region are actively taking measures to encourage the adoption of renewable energy sources. For example, New Zealand has outlined its dedication to achieving full dependence on renewable electricity sources by 2030. It aims to attain net-zero greenhouse gas emissions (excluding biogenic methane) by 2050.
- The APAC market is experiencing consistent growth in connectivity through the installation of new submarine cables such as Raman, SeaMeWe-6, JUNO, Asia Link Cable, SEA-H2X, Asia Connect Cable-1, and Hawaiki Nui. These cables are anticipated to become operational during the forecast period.
- The introduction of 5G technology in the region will profoundly impact the data center industry. With 5G enabling faster internet connectivity, wider bandwidth, and reduced processing time, a substantial increase in data volume is anticipated. Hence, a surge in data demand is driving the necessity for heightened investments in regional data centers. Countries such as Indonesia, Australia, Malaysia, the Philippines, Thailand, India, Vietnam, and others expect to be significantly influenced by this technological shift.

KEY TRENDS

Increase in Digitalization

- Governments in APAC, including Malaysia, Thailand, India, Australia, Japan, South Korea, China, New Zealand, and others, prioritize digitalization as a crucial focus.
- Many governments are developing strategies to boost their countries' digital development. For instance, China's digital economy achieved a scale of about 50.2 trillion yuan in 2022, roughly equivalent to USD 7.25 trillion, comprising 41.5% of the GDP.

Adoption of Artificial Intelligence (AI)

Artificial intelligence (AI) is gaining traction across Asia as the trend toward automation and intelligent operations continues to surge. Several regional governments are rolling out multiple strategies to promote artificial intelligence. For example, South Korea's focus on the "digital strategy" aims to establish the country as a key player among the world's leading AI countries by 2027, following the U.S. and China closely.

SEGMENTATION INSIGHTS

- The APAC data center construction market is predominantly influenced by the development of colocation facilities, which has attracted significant investments. The market witnesses continuous expansion as new entrants actively participate in establishing colocation data centers. Concurrently, hyperscale data center operators are strengthening their market footprint by investing substantially in cloud regions. Notably, in 2023, countries such as Australia, India, and Japan also witnessed notable investments in enterprise data centers.
- In the APAC region, countries often experience elevated temperatures and water scarcity issues. Consequently, data center operators in this region are inclined to employ air-based cooling methods. Many data centers also opt for free-cooling chillers, allowing for partial cooling by harnessing outside air.
- Given the typically elevated temperatures and water scarcity challenges in APAC countries, data center operators are inclined to employ air-based cooling methods. Many data centers also favor free-cooling chillers, enabling them to achieve partial cooling by harnessing external air.
- The region is experiencing an uptick in establishing data centers, particularly those undergoing Tier III and IV certification in the design or construction stages. Many private and public entities, including those in banking, financial services, insurance (BFSI), education, and government sectors, are obtaining Uptime Institute's Tier III/IV certification either during the design phase or after the facility's completion.

The report includes the investment in the following areas:

- Facility Type
  - Colocation Data Centers
  - Hyperscale Data Centers
  - Enterprise Data Centers
- Infrastructure
  - Electrical Infrastructure
  - Mechanical Infrastructure
  - General Construction
- Electrical Infrastructure
  - UPS Systems
  - Generators

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

GEOGRAPHICAL ANALYSIS

- China dominates the APAC data center construction market regarding data center development. India, Australia, Japan, Singapore, and Hong Kong are among the other major markets with high data center development activities in APAC.
- Regarding power capacity growth across markets, emerging locations such as South Korea, Taiwan, Singapore, and Malaysia lead the APAC data center construction market with absolute growth rates of around 120%, 300%, 100%, and 92%, respectively, between 2024 and 2029.
- In terms of power capacity, barring China, emerging locations such as India, Hong Kong, Japan, the Philippines, Taiwan, and South Korea displayed strong growth between 2022 and 2023 with absolute growth rates of around 9%, 26%, 28%, 53%, 18%, and 19%, respectively, which has led to strong growth in the overall APAC region.
- In terms of investment, in 2023, markets such as India, Japan, South Korea, the Philippines, Vietnam, and others witnessed stronger growth in the APAC data center construction market than in past years. Significantly emerging Southeast Asian locations, such as Malaysia and Indonesia, have grown across Johor, Cyberjaya, Jakarta, and West Java.
- However, after lifting the ban on data center construction in Singapore, other major markets in Southeast Asia might experience some challenges from the Singapore market in terms of demand attraction capacity.
- China, India, South Korea, and Indonesia are experiencing substantial growth in adopting artificial intelligence (AI). In addition, Indonesia, Malaysia, and the Philippines are attracting fresh investments from data center operators, making them anticipated choices for data center development in the upcoming forecast period.
- Overall, almost all the APAC data center construction markets are showing opportunities for data center growth in the coming

years. Nevertheless, there is an anticipation of a gradual acceleration in investments over the next two to three years, driven by the projected increase in project announcements and growing demand across countries in APAC.

- Geography
  - China
  - Hong Kong
  - Australia
  - New Zealand
  - Japan
  - India
  - South Korea
  - Taiwan
  - Rest of APAC
  - Southeast Asia
    - Singapore
    - Indonesia
    - Malaysia
    - Thailand
    - Philippines
    - Vietnam
    - Other Southeast Asian Countries

VENDOR LANDSCAPE

- The APAC data center construction market has grown significantly over the last five years, thanks to investments from several local and global operators.
- Colocation providers strategically build facilities in phases within the APAC region, aligning with market demand. Further, there is an expectation for a heightened demand for power infrastructure featuring higher capacity systems in 2N redundancy configuration across multiple facilities.
- Investors in APAC adopt various sustainable designs to ensure that the facility operates at a PUE of less than 1.4, which was not achievable by the operational data center built before 2017. Innovative air-based cooling solutions, efficient power technologies, and sustainable construction practices complement the recent sustainable data center design practices.
- Major hyperscale operators investing in the APAC data center construction market include Amazon Web Services (AWS), Microsoft, Meta (Facebook), and Google.

- Key Construction Contractors

  - AECOM
  - Arup
  - Aurecon Group
  - CSF Group
  - DSCO Group
  - Gammon Construction
  - Larsen & Toubro
  - NTT Facilities
  - PM Group

o Studio One Design

- Other Prominent Construction Contractors

o AWP Architects
o BYME Engineering
o Chung Hing Engineers Group
o Corgan
o CTCI
o DPR Construction
o Fortis Construction
o Hutchinson Builders
o ISG
o Kienta Engineering Construction
o Linesight
o LSK Engineering
o M+W Group
o Nakano Corporation
o Obayashi Corporation
o Powerware Systems
o Sato Kogyo
o Sterling and Wilson (Shapoorji Pallonji Group)
o Red Engineering
o Rider Levett Bucknall
o Turner & Townsend

- Prominent Support Infrastructure Vendors

o ABB
o Caterpillar
o Cisco Systems
o Cummins
o Eaton
o Rittal
o Schneider Electric
o STULZ
o Vertiv
- Other Prominent Support Infrastructure Vendors

o Airedale
o Alfa Laval
o Canovate
o Cyber Power Systems
o Delta Electronics
o EAE
o Fuji Electric
o Green Revolution Cooling

o HITEC Power Protection
o KOHLER Power
o Legrand
o Mitsubishi Electric
o Narada
o Piller Power Systems
o Rolls-Royce
o Shenzhen Envicool Technology
o Siemens
o Socomec
o Trane

- Prominent Data Center Investors

o Alibaba Group
o AirTrunk
o Amazon Web Services
o China Unicom
o China Mobile International
o Chindata Group (Bridge Data Centres)
o Digital Realty
o Equinix
o GDS Services
o Keppel Data Centres
o Microsoft
o NTT Global Data Centers
o NEXTDC
o ST Telemedia Global Data Centres

- Other Prominent Data Center Investors

o AdaniConneX
o Big Data Exchange
o CDC Data Centres
o Chayora
o Colt Data Centre Services
o CtrlS Datacenters
o Digital Edge DC
o Edge Centres
o EdgeConneX
o Facebook (Meta)
o Google
o Haoyun Changsheng (Hotwon)
o Huawei Technologies
o Iron Mountain
o LG Uplus
o MettaDC

o Nxtra by Airtel
o OneAsia Network
o Open DC
o Princeton Digital Group
o Pure Data Centres Group
o SpaceDC
o Shanghai Atrium (AtHub)
o STACK Infrastructure
o SUNeVison Holdings (iAdvantage)
o Sify Technologies
o Tencent
o Tenglong Holding Group
o Vantage Data Centers
o Viettel IDC
o VNET
o Yotta Infrastructure Solutions
o YTL Data Center

- New Entrants

o Digital Halo
o Empyrion DC
o Evolution Data Centres
o GreenSquareDC
o Gaw Capital
o Infracrowd Capital
o K2 Data Centres
o Minoro Energi Indonesia
o Nautilus Data Technologies
o SC Zeus Data Centers
o Regal Orion
o YCO Cloud
o Yondr

KEY QUESTIONS ANSWERED:

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

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