SCOTTS INTERNATIONAL

APAC Data Center Market Landscape 2024-2029

Market Report | 2024-06-20 | 88 pages | Arizton Advisory & Intelligence

AVAILABLE LICENSES:

- Single User License $4500.00
- Team License $5500.00
- Enterprisewide $6500.00

Report description:

The APAC data center market by investments is expected to grow at a CAGR of 10.25% from 2023 to 2029.

KEY TRENDS

Increased Digitalization Is Driving the Growth of Data Centers in the APAC Region

- The APAC data center market is experiencing expansion, fueled by the widespread digital transformation across the region. The growing digitalization trend is driving a swift surge in demand for data centers, with various regions implementing their digital strategies.
- The region's rapid adoption of digital technologies is driven by an increasing demand for improved productivity, optimized resource utilization, and various other advantages. The expansion of 5G connectivity, coupled with the utilization of Big Data and IoT services, further contributes to the ongoing digitalization trend in the area.
- China's national development strategy consistently favors the digital economy. In alignment with the 14th Five-Year Plan, China seeks to enhance expertise in critical domains, including quantum information, communications, integrated circuits, sensors, and blockchain. Additionally, it actively promotes emerging technologies such as 6G.
- The Indian government initiated the Digital India program, which encompasses multiple government departments and aims to nurture a future of learning and development for India.

Deployment of Edge Data Centers Fueled by Growing 5G Network Connectivity

- The adoption of 5G technology is widespread in various countries, including China, Australia, Japan, Singapore, and South Korea. The deployment of 5G in multiple locations is propelled by the need for high computing power and enhanced connectivity standards within data centers.
- Some major operators in Hong Kong are China Mobile Hong Kong Ltd, Hong Kong Ltd, SmarTone Mobile Communications Ltd, and Hutchison Telephone Company Ltd.

-The government has uniquely agreed with New Zealand's three primary network providers - Spark, 2Degrees, and One New Zealand. This agreement aims to accelerate the deployment of 5G services in approximately 55 rural and regional towns across the country while extending mobile wireless coverage to additional remote areas that currently lack adequate service.

Rising Adoption of Artificial Intelligence Fueling the Demand for Efficient Infrastructure

-The deployment of edge data centers is fueled by growing 5G network connectivity.
-The adoption of 5G technology is widespread in various countries, including China, Australia, Japan, Singapore, and South Korea. The deployment of 5G in multiple locations is propelled by the need for high computing power and enhanced connectivity standards within data centers.

SEGMENTATION INSIGHTS

-Servers are available in various types and configurations. Regarding form factors, servers are classified as rack, blade, and tower. The most common servers in the APAC data center market include rack and blade servers from vendors such as Cisco Systems, Hewlett Packard Enterprise, Dell Technologies, IBM, Lenovo, and NetApp.
-Vendors have an increasing opportunity to provide lithium-ion and nickel-zinc batteries for UPS systems. Operators can also adopt new-age generator sets that run on hydrotreated vegetable oil (HVO), natural gas, etc.
-The APAC data center market is witnessing the adoption of air-and water-based cooling systems, followed by water-based cooling solutions, which are in major demand due to the region's tropical climate.

Segmentation by Facility Type
-Hyperscale Data Centers
-Colocation Data Centers
-Enterprise Data Centers
Segmentation by Infrastructure
-IT Infrastructure
-Electrical Infrastructure
-Mechanical Infrastructure
-General Construction
Segmentation by IT Infrastructure
-Server Infrastructure
-Storage Infrastructure
-Network Infrastructure
Segmentation by Electrical Infrastructure
-UPS Systems
-Generators
-Transfer Switches & Switchgear
-Power Distribution Units
-Other Electrical Infrastructure
Segmentation by Mechanical Infrastructure
-Cooling Systems
-Racks
-Other Mechanical Infrastructure
Segmentation by Cooling Systems
-CRAC & CRAH Units
-Chiller Units

-Cooling Towers, Condensers, and Dry Coolers
-Economizers & Evaporative Coolers
-Other Cooling Units
Segmentation by Cooling Techniques
-Air-based
-Liquid-based
Segmentation by General Construction
-Core & Shell Development
-Installation & Commissioning Services
-Engineering & Building Design
-Physical Security
-Fire Detection & Suppression
-DCIM
Segmentation by Tier Standard
-Tier I & II
-Tier III
-Tier IV

GEOGRAPHICAL ANALYSIS

-The APAC data center market is one of the major growing data center markets globally, with a higher investment contribution from countries such as Australia, India, China, and Japan, with other countries such as South Korea, Taiwan, Hong Kong, and New Zealand with steadily rising data center activities.
-Malaysia and Indonesia have emerged as the major growing markets in the APAC data center market after a setback in Singapore due to a past moratorium on data center construction. Investment in Singapore is expected to rise again after the government announced a pilot project for data center construction.
-Other countries, such as the Philippines, Vietnam, and Thailand, are witnessing a sudden surge in demand, especially from the spillover of demand from Singapore after the moratorium. Countries such as Vietnam and the Philippines are among the markets that are expected to witness a growth rate increase in the coming years.

Segmentation by Geography
-China
-Hong Kong
-Australia
-New Zealand
-India
-Japan
-South Korea
-Taiwan
-Rest of APAC
oSoutheast Asia
oSingapore
oIndonesia
oMalaysia
oThailand
oPhilippines
oVietnam

o Rest of Southeast Asia

VENDOR LANDSCAPE

- The APAC data center market hosts several local and global IT infrastructure vendors such as Hewlett Packard Enterprise, IBM, Atos, Cisco Systems, Dell Technologies, Arista Networks, Juniper Networks, and others. Vendors continuously invest in innovations in their offerings to meet market demand.
- The APAC data center market has multiple local and global support infrastructure vendors, which has increased its competitiveness. Some major vendors in the APAC data center market include ABB, Caterpillar, Cummins, Eaton, Rittal, STULZ, Schneider Electric, Vertiv, and others.
- Global general construction contractors such as AECOM, Arup, CSF Group, DSCO Group, NTT Facilities, RED, and others have increased the construction speed, and the availability of a skilled workforce has become easier through multiple organizations.

IT INFRASTRUCTURE PROVIDERS
- Arista Networks
- Atos
- Cisco Systems
- Dell Technologies
- Broadcom
- Extreme Networks
- Fujitsu
- Hewlett Packard Enterprise
- Hitachi Vantara
- Huawei
- IBM
- Inspur
- Intel
- Juniper Networks
- Lenovo
- Micron Technology
- NEC
- NetApp
- Oracle
- Pure Storage
- Quanta Cloud Technology
- QNAP
- Quantum
- Seagate Technology
- Super Micro Computer
- Toshiba
- Western Digital
- Wiwynn

Prominent Construction Contractors
- AECOM
- Arup
- Aurecon Group

- CSF Group
- DSCO Group
- Gammon Construction
- Larsen & Toubro (L&T)
- NTT Facilities
- PM Group
- Studio One Design

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

Prominent Support Infrastructure Vendors
- ABB
- Caterpillar
- Cummins
- Eaton
- Rittal
- Schneider Electric
- STULZ
- Vertiv

Other Prominent Support Infrastructure Vendors
- Airedale
- Alfa Laval
- Canovate
- Cyber Power Systems
- Delta Electronics

- EAE
- Fuji Electric
- Green Revolution Cooling (GRC)
- HITEC Power Protection
- KOHLER Power
- Legrand
- Mitsubishi Electric
- Narada
- Piller Power Systems
- Rolls-Royce
- Shenzhen Envicool Technology
- Siemens
- Socomec
- Trane

Prominent Data Center Investors
- Alibaba Group
- AirTrunk
- Amazon Web Services
- China Unicom
- China Mobile
- Chindata Group
- Digital Realty
- Equinix
- GDS Services
- Keppel Data Centres
- Microsoft
- NTT Global Data Centers
- NEXTDC
- ST Telemedia Global Data Centres

Other Prominent Data Center Investors
- AdaniConneX
- BDX
- CDC Data Centres
- Chayora
- Colt Data Centre Services
- CtrlS Datacenters
- Digital Edge DC
- Edge Centres
- EdgeConneX
- Meta
- Google
- Haoyun Changsheng
- Huawei Technologies
- Iron Mountain
- LG Uplus

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

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

KEY QUESTIONS ANSWERED:

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

Table of Contents:

1. ABOUT ARIZTON
1.1. ABOUT OUR DATA CENTER CAPABILITIES
1.2. WHAT'S INCLUDED
1.3. SEGMENTS INCLUDED

1.4. RESEARCH METHODOLOGY
1.5. MARKET AT GLANCE
1.6. PREMIUM INSIGHTS
1.7. INVESTMENT OPPORTUNITIES
1.7.1. INVESTMENT: MARKET SIZE & FORECAST
1.7.2. AREA: MARKET SIZE & FORECAST
1.7.3. POWER CAPACITY: MARKET SIZE & FORECAST
2. MARKET DYNAMICS
2.1. MARKET OPPORTUNITIES & TRENDS
2.2. MARKET GROWTH ENABLERS
2.3. MARKET RESTRAINTS
2.4. SITE SELECTION CRITERIA
3. FACILITY TYPE SEGMENTATION
3.1. HYPERSCALE DATA CENTERS
3.2. COLOCATION DATA CENTERS
3.3. ENTERPRISE DATA CENTERS
4. INFRASTRUCTURE SEGMENTATION
4.1. IT INFRASTRUCTURE
4.2. ELECTRICAL INFRASTRUCTURE
4.3. MECHANICAL INFRASTRUCTURE
4.4. COOLING SYSTEMS
4.5. COOLING TECHNIQUES
4.6. GENERAL CONSTRUCTION
5. TIER STANDARDS SEGMENTATION
6. GEOGRAPHY SEGMENTATION
7. APAC
7.1. MARKET SNAPSHOT & KEY HIGHLIGHTS
7.2. DATA CENTER MARKET BY INVESTMENT
7.3. DATA CENTER MARKET BY INFRASTRUCTURE
7.4. DATA CENTER MARKET BY AREA
7.5. DATA CENTER MARKET BY POWER CAPACITY
7.6. DATA CENTER MARKET BY SUPPORT INFRASTRUCTURE
7.7. DATA CENTER MARKET BY IT INFRASTRUCTURE
8. CHINA
8.1. KEY INVESTORS & INVESTMENTS
8.2. MARKET BY INVESTMENT
8.3. KEY SEZS
8.4. MARKET BY AREA
8.5. RENEWABLE ENERGY ADOPTION
8.6. MARKET BY POWER CAPACITY
8.7. KEY SUPPORT INFRASTRUCTURE ADOPTION
8.8. MARKET BY INFRASTRUCTURE
9. HONG KONG
9.1. KEY INVESTORS & INVESTMENTS
9.2. MARKET BY INVESTMENT
9.3. KEY HIGHLIGHTS & LAND PRICING
9.4. MARKET BY AREA

9.5. POWER PRICING & RENEWABLE ENERGY ADOPTION
9.6. MARKET BY POWER CAPACITY
9.7. KEY SUPPORT INFRASTRUCTURE ADOPTION
9.8. MARKET BY INFRASTRUCTURE
10. AUSTRALIA
10.1. KEY INVESTORS & INVESTMENTS
10.2. MARKET BY INVESTMENT
10.3. KEY AREA & LAND PRICING
10.4. MARKET BY AREA
10.5. RENEWABLE ENERGY ADOPTION
10.6. MARKET BY POWER CAPACITY
10.7. KEY SUPPORT INFRASTRUCTURE ADOPTION
10.8. MARKET BY INFRASTRUCTURE
11. NEW ZEALAND
11.1. KEY INVESTORS & INVESTMENTS
11.2. MARKET BY INVESTMENT
11.3. KEY AREA & LAND PRICING
11.4. MARKET BY AREA
11.5. POWER PRICING & RENEWABLE ENERGY ADOPTION
11.6. MARKET BY POWER CAPACITY
11.7. KEY SUPPORT INFRASTRUCTURE ADOPTION
11.8. MARKET BY INFRASTRUCTURE
12. INDIA
12.1. KEY INVESTORS & INVESTMENTS
12.2. MARKET BY INVESTMENT
12.3. KEY HIGHLIGHTS & LAND ACQUISITIONS
12.4. MARKET BY AREA
12.5. RENEWABLE ENERGY ADOPTION
12.6. MARKET BY POWER CAPACITY
12.7. KEY SUPPORT INFRASTRUCTURE ADOPTION
12.8. MARKET BY INFRASTRUCTURE
13. JAPAN
13.1. KEY INVESTORS & INVESTMENTS
13.2. MARKET BY INVESTMENT
13.3. KEY DEVELOPMENT, LAND ACQUISITION & INVESTMENT COST
13.4. MARKET BY AREA
13.5. POWER PRICING & RENEWABLE ENERGY ADOPTION
13.6. MARKET BY POWER CAPACITY
13.7. KEY SUPPORT INFRASTRUCTURE ADOPTION
13.8. MARKET BY INFRASTRUCTURE
14. SOUTH KOREA
14.1. KEY INVESTORS & INVESTMENTS
14.2. MARKET BY INVESTMENT
14.3. KEY AREA DEVELOPMENT, FEZS & LAND PRICING
14.4. MARKET BY AREA
14.5. POWER PRICING & RENEWABLE ENERGY ADOPTION
14.6. MARKET BY POWER CAPACITY

14.7. KEY SUPPORT INFRASTRUCTURE ADOPTION
14.8. MARKET BY INFRASTRUCTURE
15. TAIWAN
15.1. KEY INVESTORS & INVESTMENTS
15.2. MARKET BY INVESTMENT
15.3. KEY HIGHLIGHTS & INDUSTRIAL PARK
15.4. MARKET BY AREA
15.5. POWER PRICING & RENEWABLE ENERGY ADOPTION
15.6. MARKET BY POWER CAPACITY
15.7. KEY SUPPORT INFRASTRUCTURE ADOPTION
15.8. MARKET BY INFRASTRUCTURE
16. REST OF APAC
16.1. KEY INVESTORS & INVESTMENTS
16.2. MARKET BY INVESTMENT
16.3. KEY HIGHLIGHTS & DEVELOPMENT
16.4. MARKET BY AREA
16.5. RENEWABLE ENERGY ADOPTION
16.6. MARKET BY POWER CAPACITY
16.7. KEY SUPPORT INFRASTRUCTURE ADOPTION
16.8. MARKET BY INFRASTRUCTURE
17. SOUTHEAST ASIA
17.1. MARKET SNAPSHOT & KEY HIGHLIGHTS
17.2. DATA CENTER MARKET BY INVESTMENT
17.3. DATA CENTER MARKET BY INFRASTRUCTURE
17.4. DATA CENTER MARKET BY AREA
17.5. DATA CENTER MARKET BY POWER CAPACITY
17.6. DATA CENTER MARKET BY SUPPORT INFRASTRUCTURE
17.7. DATA CENTER MARKET BY IT INFRASTRUCTURE
18. SINGAPORE
18.1. KEY INVESTORS & INVESTMENTS
18.2. MARKET BY INVESTMENT
18.3. KEY FTZS & LAND PRICING
18.4. MARKET BY AREA
18.5. RENEWABLE ENERGY ADOPTION
18.6. MARKET BY POWER CAPACITY
18.7. KEY SUPPORT INFRASTRUCTURE ADOPTION
18.8. MARKET BY INFRASTRUCTURE
19. INDONESIA
19.1. KEY INVESTORS & INVESTMENTS
19.2. MARKET BY INVESTMENT
19.3. KEY FTZS & INVESTMENT COST
19.4. MARKET BY AREA
19.5. RENEWABLE ENERGY ADOPTION
19.6. MARKET BY POWER CAPACITY
19.7. KEY SUPPORT INFRASTRUCTURE ADOPTION
19.8. MARKET BY INFRASTRUCTURE
20. MALAYSIA

20.1. KEY INVESTORS & INVESTMENTS
20.2. MARKET BY INVESTMENT
20.3. KEY FTZS, AREA DEVELOPMENT & LAND PRICING
20.4. MARKET BY AREA
20.5. POWER PRICING & RENEWABLE ENERGY ADOPTION
20.6. MARKET BY POWER CAPACITY
20.7. KEY SUPPORT INFRASTRUCTURE ADOPTION
20.8. MARKET BY INFRASTRUCTURE
21. THAILAND
21.1. KEY INVESTORS & INVESTMENTS
21.2. MARKET BY INVESTMENT
21.3. KEY LAND PRICING & AREA DEVELOPMENT
21.4. MARKET BY AREA
21.5. POWER PRICING & POWER ADDITION
21.6. MARKET BY POWER CAPACITY
21.7. KEY SUPPORT INFRASTRUCTURE ADOPTION
21.8. MARKET BY INFRASTRUCTURE
22. PHILIPPINES
22.1. KEY INVESTORS & INVESTMENTS
22.2. MARKET BY INVESTMENT
22.3. KEY FTZS & HIGHLIGHTS
22.4. MARKET BY AREA
22.5. POWER PRICING & RENEWABLE ENERGY ADOPTION
22.6. MARKET BY POWER CAPACITY
22.7. KEY SUPPORT INFRASTRUCTURE ADOPTION
22.8. MARKET BY INFRASTRUCTURE
23. VIETNAM
23.1. KEY INVESTORS & INVESTMENTS
23.2. MARKET BY INVESTMENT
23.3. KEY FTZS & LAND PRICING
23.4. MARKET BY AREA
23.5. RENEWABLE ENERGY ADOPTION
23.6. MARKET BY POWER CAPACITY
23.7. KEY SUPPORT INFRASTRUCTURE ADOPTION
23.8. MARKET BY INFRASTRUCTURE
24. REST OF SOUTHEAST ASIA
24.1. KEY INVESTORS & INVESTMENTS
24.2. MARKET BY INVESTMENT
24.3. KEY AREA DEVELOPMENT
24.4. MARKET BY AREA
24.5. RENEWABLE ENERGY ADOPTION
24.6. MARKET BY POWER CAPACITY
24.7. KEY SUPPORT INFRASTRUCTURE ADOPTION
24.8. MARKET BY INFRASTRUCTURE
25. MARKET PARTICIPANTS
25.1. IT INFRASTRUCTURE PROVIDERS
25.2. SUPPORT INFRASTRUCTURE PROVIDERS

25.3. DATA CENTER CONTRACTORS & SUBCONTRACTORS
25.4. DATA CENTER INVESTORS
25.5. NEW ENTRANTS
26. QUANTITATIVE SUMMARY
27. APPENDIX
27.1. ABBREVIATIONS
27.2. DEFINITIONS
27.3. SEGMENTAL COVERAGE

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com

SCOTTS INTERNATIONAL

APAC Data Center Market Landscape 2024-2029

Market Report | 2024-06-20 | 88 pages | Arizton Advisory & Intelligence

To place an Order with Scotts International:

- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	$4500.00
	Team License	$5500.00
	Enterprisewide	$6500.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2025-06-23
		Signature	