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

Market Report | 2024-06-20 | 104 pages | Arizton Advisory & Intelligence

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Report description:

The Turkey data center market is expected to grow at a CAGR of 6.52% from 2023 to 2029.

KEY HIGHLIGHTS

-The Turkey data center market has about 31 operational colocation data centers. Most are being developed according to Tier III standards. For instance, Turk Telekom's Esenyurt facility in Istanbul is built to Tier III standards.
-Istanbul is Turkey's primary location for investments in the Turkey data center market, followed by Ankara, Izmir, and other cities. Istanbul is home to around 20 third-party data center facilities, representing a market share of around 65%.
-Turkey (Istanbul) is the third most expensive market in the Middle East region to develop a data center facility after Saudi Arabia and the UAE. The data center construction cost in 2023 was about $8-$9 million per MW, and it is likely to increase by around 3%-4% YoY.
-Deployment and adoption of 5G services in Turkey will fuel data traffic and further grow the demand for more data centers. The telecom operators present in the market include Vodafone Turkey, Turk Telekom, and Turkcell.
-Smart City developments are on the rise in this country. As per IMD's smart city index list 2023, Istanbul has captured the 107th spot on the global list of smart cities among 141 countries. The HDI (Human Development Index) here is 0.867, much lower than other countries in the region, such as the UAE and Saudi Arabia.

WHY SHOULD YOU BUY THIS RESEARCH?

-Market size regarding investment, area, power capacity, and Turkey's colocation market revenue is available.
-An assessment of the data center investment in Turkey 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 Turkey 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 Turkey

I. Facilities Covered (Existing): 31
II. Facilities Identified (Upcoming): 3
III. Coverage: 6 Cities
IV. Existing vs. Upcoming (Area)
V. Existing vs. Upcoming (IT Load Capacity)
- Data Center Colocation Market in Turkey
I. Colocation Market Revenue & Forecast
II. Wholesale vs. Retail Colocation Revenue
III. Retail Colocation Pricing
IV. Wholesale Colocation Pricing
- The Turkey 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 market.

VENDOR LANDSCAPE

- Some key colocation operators in the Turkey data center market are Turkcell, Turk Telekom, Equinix, Telehouse, PenDC, and Radore.
- EDGNEX Data Centres by DAMAC and EdgeConneX are among the new entrants into the Turkey data center market as of 2023-2024.
- Global colocation service providers are expected to enter the Turkish data center market through strategic partnerships with local enterprises and telecom companies. For instance, EDGNEX Data Centres by DAMAC formed a joint venture with Vodafone Turkey to develop a new data center facility in Izmir.
- Only Huawei Cloud has its dedicated cloud region in Istanbul, Turkey. Other cloud operators like AWS, Google, and Microsoft have yet to launch their cloud regions in the country. Alibaba Group has planned for a data center in Ankara.
- Turk Telekom, an integrated telecommunications operator, is focused on improving customer service and experience. To this end, it partnered with Micro Focus to create a digital infrastructure and manage and analyze Big Data.

EXISTING VS. UPCOMING DATA CENTERS

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

VENDORS

- IT Infrastructure Providers
o Arista Networks
o Atos
o Broadcom

o Cisco Systems
o Dell Technologies
o Hewlett Packard Enterprise
o Huawei Technologies
o IBM
o Inspur
o Lenovo

- Data Center Construction Contractors & Sub-Contractors
o AECOM
o Anel Group
o Arup
o Deerns
o ENMAAR ENGINEERING
o Hill International
o Mace
o Manco Architects
o Prota Engineering
o RED Engineering

- Support Infrastructure Providers
o ABB
o Airedale
o Alfa Laval
o Canovate
o Caterpillar
o Cummins
o EAE
o Eaton
o Grundfos
o HITEC Power Protection
o Legrand
o Rittal
o Rolls-Royce
o Schneider Electric
o Siemens
o STULZ
o Vertiv

- Data Center Investors
o Equinix
o NGN
o PenDC
o Telehouse
o Turkcell
o Turk Telekom

-New Entrants
oEdegConneX
oEDGNEX Data Centres by DAMAC

REPORT COVERAGE:

This report analyses the Turkey 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

KEY QUESTIONS ANSWERED:

1.How much MW of power capacity will be added across Turkey during 2024-2029?
2.How big is the Turkey data center market?
3.What is the growth rate of the Turkey data center market?
4.What factors are driving the Turkey data center market?

5.Who are the new entrants in the Turkey data center market?

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