

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

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Report description:

The APAC data center colocation market by investment is expected to grow at a CAGR of 10.19% from 2023 to 2029.

KEY HIGHLIGHTS

- The deployment of 5G services and the growth in the demand for connectivity in new locations and Tier I and Tier II cities attract investments from edge data center operators. For instance, edge operators, such as Leading-Edge Data Centres and Edge Centres, actively invest in establishing multiple edge data centers across Indonesia, Australia, Malaysia, the Philippines, Thailand, India, Vietnam, Thailand, and others.
- Governments and data center operators are becoming increasingly interested in renewable energy. Governments across all APAC countries are taking initiatives to promote the adoption of renewable energy sources. For instance, Taiwan aims to generate 20% of its electricity through renewable energy by 2025 using wind and solar PV promotion plans. Taiwan's renewable power capacity will reach over 26 GW within the next five years.
- Data center operators also participate in governments' efforts to adopt sustainable energy by using renewable energy, signing Power Purchase Agreements (PPAs), or setting targets for carbon-free operations. For instance, in March 2024, NTT DATA signed a new solar energy PPA of around 40 MW with TEPCO.

KEY TRENDS

Increased Digitalization

- Digitalization is a major agenda of governments in all countries, including Malaysia, Thailand, India, Australia, Japan, South Korea, China, New Zealand, and others.
- Several governments plan digital strategies to strengthen the digital growth of their countries. For instance, the government of Australia launched its Digital Economy Strategy 2022 Update to develop Australia's digital economy by 2030.

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Rise in Mergers and Acquisitions & Joint Ventures

-□The significant growth potential and revenue-generating opportunities in the APAC data center market prompt operators to continuously invest in mergers and acquisitions and engage in project joint ventures. Several global organizations enter the industry through joint ventures. For instance, STACK Infrastructure entered the South Korean industry through a joint venture with ESR Cayman to develop a data center.

SEGMENTATION INSIGHTS

-□The development of colocation data centers dominates the data center construction market in APAC in terms of the number of investments. Several new entrants enter the market for the development of colocation data centers. Hyperscale data center operators also increase their market presence with investments in cloud regions. In 2023, some countries, such as Indonesia, Australia, and Myanmar, also witnessed investments in enterprise data centers.

-□The APAC data center colocation market has strong growth potential in electrical infrastructure due to the high demand for lithium-ion and nickel-zinc batteries used in UPS systems. Operators can also adopt new-age generator sets that run on hydrotreated vegetable oil (HVO), natural gas, etc.

-□The APAC data center colocation market demands air- and water-based cooling solutions in terms of cooling infrastructure. Data center operators, especially in Southeast Asia, are more inclined toward adopting water-based cooling solutions due to the tropical climate. The market has opportunities for rack infrastructure vendors with the growth in the adoption of racks of 42U to 52U in height. Some countries in the region also adopt racks below 42U height.

The report includes the investment in the following areas:

Segmentation by Colocation Services

- 1.□Retail Colocation
- 2.□Wholesale Colocation

Segmentation by Infrastructure

- 1.□Electrical Infrastructure
- 2.□Mechanical Infrastructure
- 3.□General Construction

Segmentation by Electrical Infrastructure

- 1.□UPS Systems
- 2.□Generators
- 3.□Transfer Switches & Switchgear
- 4.□PDUs
- 5.□Other Electrical Infrastructure

Segmentation by Mechanical Infrastructure

- 1.□Cooling Systems
- 2.□Racks
- 3.□Other Mechanical Infrastructure

Segmentation by Cooling Systems

- 1.□CRAC & CRAH Units
- 2.□Chiller Units
- 3.□Cooling Towers, Condensers & Dry Coolers
- 4.□Economizers & Evaporative Coolers
- 5.□Other Cooling Units

Segmentation by Cooling Techniques

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1. □ Air-based Cooling
 2. □ Liquid-based Cooling
- Segmentation by General Construction
1. □ Core & Shell Development
 2. □ Installation & Commissioning Services
 3. □ Engineering & Building Design
 4. □ Fire Detection & Suppression
 5. □ Physical Security
 6. □ DCIM/BMS Solutions
- Segmentation by Tier Standards
1. □ Tier I & II
 2. □ Tier III
 3. □ Tier IV

GEOGRAPHICAL ANALYSIS

- □ China dominates the regional market in terms of data center development. India, Australia, Japan, Singapore, and Hong Kong are among the other major markets with high development activities in the APAC data center colocation industry.
- □ China, India, South Korea, and Indonesia are experiencing substantial growth in the adoption of 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.
- □ In Southeast Asia, Malaysia and Indonesia stand out as significant market investors. Nevertheless, the projected increase in project announcements is driving anticipation of a gradual investment acceleration over the next two to three years.

Segmentation by Geography

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

VENDOR LANDSCAPE

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- The APAC data center colocation market grew significantly over the last five years with investments from several local and global data center operators. In 2023, APAC dominated the market in terms of total investments.
- 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. The recent sustainable data center design practices complement innovative air-based cooling solutions, efficient power technologies, and sustainable construction practices.
- The development of hyperscale data center campuses in APAC will bring in a significant revenue opportunity for vendors that offer the fastest-growing technologies, such as liquid immersion cooling, direct-to-chip cooling, lithium-ion UPS, HVO generators, microgrid technologies, renewable power solutions, and net-zero water data centers.
- The APAC data center colocation market witnessed a significant increase in new entrants in the last few years, owing to the market's strong growth potential. The increase in new entrants will increase the competition for existing data center operators, expanding their presence across countries.
- The APAC data center colocation market will bring multi-million-dollar revenue opportunities for construction contractors and sub-contractors operating in the market. It will also attract new companies willing to offer construction services.

Prominent Data Center Investors

- AirTrunk
- Big Data Exchange
- CDC Data Centres
- Chayora
- Chindata Group
- Colt Data Centre Services
- CtrlS Datacenters
- Digital Edge DC
- Digital Realty
- Equinix
- GDS Services
- Iron Mountain
- Keppel Data Centres
- LG Uplus
- NEXTDC
- NTT DATA
- Nxtra by Airtel
- OneAsia Network
- Open DC
- Pi DATACENTERS
- Princeton Digital Group
- Regal Orion
- SpaceDC
- ST Telemedia Global Data Centres
- SUNeVison Holdings (iAdvantage)
- Sify Technologies
- Tenglong Holding Group
- Viettel IDC
- VNET
- Yotta Infrastructure Solutions

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New Entrants

- AdaniConneX
- Data Center First
- Edge Centres
- EdgeConneX (EQT Infrastructure)
- Evolution Data Centres
- Hickory
- MettaDC
- Nautilus Data Technologies
- Pure Data Centres
- Vantage Data Centers
- YCO Cloud
- YTL Data Center
- Yondr

KEY QUESTIONS ANSWERED:

- 1.□How big is the APAC data center colocation market?
- 2.□What is the growth rate of the APAC data center colocation market?
- 3.□What are the key trends in the Asia-Pacific data center colocation industry?
- 4.□What is the estimated market size in terms of area in the APAC data center colocation market by 2029?

Table of Contents:

- 1.□REPORT COVERAGE
 - 1.1.□WHAT'S INCLUDED
 - 1.2.□SEGMENTAL COVERAGE
 - 1.2.1.□Market Segmentation by Colocation Service Type
 - 1.2.2.□Market Segmentation by Support Infrastructure
 - 1.2.3.□Market Segmentation by Electrical Infrastructure
 - 1.2.4.□Market Segmentation by Mechanical Infrastructure
 - 1.2.5.□Market Segmentation by Cooling Systems
 - 1.2.6.□Market Segmentation by Cooling Techniques
 - 1.2.7.□Market Segmentation by General Construction
 - 1.2.8.□Market Segmentation by Tier Standards
- 2.□MARKET AT A GLANCE
- 3.□PREMIUM INSIGHTS
 - 3.1.□KEY MARKETS HIGHLIGHTS
 - 3.2.□KEY MARKETS TRENDS
 - 3.2.1.□Increased Digitalization
 - 3.2.2.□Rise in Mergers and Acquisitions & Joint Ventures
 - 3.3.□SEGMENTATION ANALYSIS
 - 3.4.□GEOGRAPHICAL ANALYSIS
 - 3.5.□VENDOR ANALYSIS
- 4.□INTRODUCTION
 - 4.1.□INTERNET PENETRATION
 - 4.2.□DIGITAL APAC

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- 4.2.1. □ Hong Kong
- 4.2.2. □ Australia
- 4.2.3. □ New Zealand
- 4.2.4. □ India
- 4.2.5. □ Japan
- 4.2.6. □ Taiwan
- 4.2.7. □ South Korea
- 4.2.8. □ Malaysia
- 4.2.9. □ Thailand
- 4.2.10. □ Indonesia
- 4.2.11. □ Philippines
- 4.2.12. □ Vietnam
- 4.3. □ NETWORK READINESS INDEX
 - 4.3.1. □ Technology
 - 4.3.2. □ People
 - 4.3.3. □ Governance
 - 4.3.4. □ Impact
- 5. □ MARKET OPPORTUNITIES & TRENDS
 - 5.1. □ AI INFLUENCES DATA CENTER GROWTH
 - 5.2. □ 5G HELPS EDGE DATA CENTERS GROW
 - 5.3. □ GROWTH IN ADOPTION OF RENEWABLE ENERGY
- 6. □ MARKET GROWTH ENABLERS
 - 6.1. □ ADOPTION OF CLOUD-BASED SERVICES TO DRIVE DATA CENTER MARKET
 - 6.2. □ MERGERS AND ACQUISITIONS & JOINT VENTURES IN REGION
 - 6.3. □ INCREASE IN SUBMARINE CONNECTIVITY
 - 6.4. □ INCREASE IN INTERNET CONNECTIVITY AND DIGITAL ECONOMY
- 7. □ MARKET RESTRAINTS
 - 7.1. □ LOCATION CONSTRAINTS ON DATA CENTER DEVELOPMENT
 - 7.2. □ RISE IN POWER AND NETWORK OUTAGES
 - 7.3. □ SECURITY CHALLENGES IN DATA CENTER
- 8. □ MARKET LANDSCAPE
 - 8.1. □ MARKET OVERVIEW
 - 8.2. □ INVESTMENT: MARKET SIZE & FORECAST
 - 8.3. □ AREA: MARKET SIZE & FORECAST
 - 8.4. □ POWER CAPACITY: MARKET SIZE & FORECAST
 - 8.5. □ COLOCATION REVENUE: MARKET SIZE & FORECAST
- 9. □ COLOCATION SERVICES MARKET
 - 9.1. □ MARKET SNAPSHOT
 - 9.2. □ MARKET OVERVIEW
 - 9.3. □ RETAIL COLOCATION
 - 9.3.1. □ Market Overview
 - 9.3.2. □ Revenue: Market Size & Forecast
 - 9.4. □ WHOLESALE COLOCATION
 - 9.4.1. □ Market Overview
 - 9.4.2. □ Revenue: Market Size & Forecast
- 10. □ SUPPORT INFRASTRUCTURE
 - 10.1. □ MARKET SNAPSHOT

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- 10.2. □KEY HIGHLIGHTS
- 10.3. □MARKET OVERVIEW
- 10.4. □ELECTRICAL INFRASTRUCTURE
 - 10.4.1. □Market Overview
 - 10.4.2. □Investment: Market Size & Forecast
- 10.5. □MECHANICAL INFRASTRUCTURE
 - 10.5.1. □Market Overview
 - 10.5.2. □Investment: Market Size & Forecast
- 10.6. □GENERAL CONSTRUCTION
 - 10.6.1. □Market Overview
 - 10.6.2. □Investment: Market Size & Forecast
- 11. □ELECTRICAL INFRASTRUCTURE
 - 11.1. □MARKET SNAPSHOT
 - 11.2. □KEY HIGHLIGHTS
 - 11.3. □MARKET OVERVIEW
 - 11.4. □UPS SYSTEMS
 - 11.4.1. □Market Overview
 - 11.4.2. □Investment: Market Size & Forecast
 - 11.5. □GENERATORS
 - 11.5.1. □Market Overview
 - 11.5.2. □Investment: Market Size & Forecast
 - 11.6. □TRANSFER SWITCHES & SWITCHGEAR
 - 11.6.1. □Market Overview
 - 11.6.2. □Investment: Market Size & Forecast
 - 11.7. □PDUS
 - 11.7.1. □Market Overview
 - 11.7.2. □Investment: Market Size & Forecast
 - 11.8. □OTHER ELECTRICAL INFRASTRUCTURE
 - 11.8.1. □Market Overview
 - 11.8.2. □Investment: Market Size & Forecast
- 12. □MECHANICAL INFRASTRUCTURE
 - 12.1. □MARKET SNAPSHOT
 - 12.2. □KEY HIGHLIGHTS
 - 12.3. □MARKET OVERVIEW
 - 12.4. □COOLING SYSTEMS
 - 12.4.1. □Market Overview
 - 12.4.2. □Investment: Market Size & Forecast
 - 12.5. □RACKS
 - 12.5.1. □Market Overview
 - 12.5.2. □Investment: Market Size & Forecast
 - 12.6. □OTHER MECHANICAL INFRASTRUCTURE
 - 12.6.1. □Market Overview
 - 12.6.2. □Investment: Market Size & Forecast
- 13. □COOLING SYSTEMS
 - 13.1. □MARKET SNAPSHOT
 - 13.2. □KEY HIGHLIGHTS
 - 13.3. □MARKET OVERVIEW

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- 13.4. □ CRAC & CRAH UNITS
 - 13.4.1. □ Market Overview
 - 13.4.2. □ Investment: Market Size & Forecast
- 13.5. □ CHILLER UNITS
 - 13.5.1. □ Market Overview
 - 13.5.2. □ Investment: Market Size & Forecast
- 13.6. □ COOLING TOWERS, CONDENSERS, AND DRY COOLERS
 - 13.6.1. □ Market Overview
 - 13.6.2. □ Investment: Market Size & Forecast
- 13.7. □ ECONOMIZERS & EVAPORATIVE COOLERS
 - 13.7.1. □ Market Overview
 - 13.7.2. □ Investment: Market Size & Forecast
- 13.8. □ OTHER COOLING UNITS
 - 13.8.1. □ Market Overview
 - 13.8.2. □ Investment: Market Size & Forecast
- 14. □ COOLING TECHNIQUES
 - 14.1. □ MARKET SNAPSHOT
 - 14.2. □ KEY HIGHLIGHTS
 - 14.3. □ MARKET OVERVIEW
 - 14.4. □ AIR-BASED COOLING TECHNIQUE
 - 14.4.1. □ Market Overview
 - 14.4.2. □ Investment: Market Size & Forecast
 - 14.5. □ LIQUID-BASED COOLING TECHNIQUE
 - 14.5.1. □ Market Overview
 - 14.5.2. □ Investment: Market Size & Forecast
- 15. □ GENERAL CONSTRUCTION
 - 15.1. □ MARKET SNAPSHOT
 - 15.2. □ KEY HIGHLIGHTS
 - 15.3. □ MARKET OVERVIEW
 - 15.4. □ CORE & SHELL DEVELOPMENT
 - 15.4.1. □ Market Overview
 - 15.4.2. □ Investment: Market Size & Forecast
 - 15.5. □ INSTALLATION AND COMMISSIONING SERVICES
 - 15.5.1. □ Market Overview
 - 15.5.2. □ Investment: Market Size & Forecast
 - 15.6. □ ENGINEERING & BUILDING DESIGN
 - 15.6.1. □ Market Overview
 - 15.6.2. □ Investment: Market Size & Forecast
 - 15.7. □ FIRE DETECTION & SUPPRESSION
 - 15.7.1. □ Market Overview
 - 15.7.2. □ Investment: Market Size & Forecast
 - 15.8. □ PHYSICAL SECURITY
 - 15.8.1. □ Market Overview
 - 15.8.2. □ Investment: Market Size & Forecast
 - 15.9. □ DCIM/BMS
 - 15.9.1. □ Market Overview
 - 15.9.2. □ Investment: Market Size & Forecast

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- 16. □ TIER STANDARDS
 - 16.1. □ MARKET SNAPSHOT
 - 16.2. □ KEY HIGHLIGHTS
 - 16.3. □ MARKET OVERVIEW
 - 16.4. □ TIER I & II
 - 16.4.1. □ Market Overview
 - 16.4.2. □ Investment: Market Size & Forecast
 - 16.5. □ TIER III
 - 16.5.1. □ Market Overview
 - 16.5.2. □ Investment: Market Size & Forecast
 - 16.6. □ TIER IV
 - 16.6.1. □ Market Overview
 - 16.6.2. □ Investment: Market Size & Forecast
- 17. □ GEOGRAPHY
 - 17.1. □ CHINA
 - 17.1.1. □ Market Overview
 - 17.1.2. □ Investment: Market Size & Forecast
 - 17.1.3. □ Area: Market Size & Forecast
 - 17.1.4. □ Power Capacity: Market Size & Forecast
 - 17.1.5. □ Support Infrastructure: Market Size & Forecast
 - 17.1.6. □ Colocation Revenue: Market Size & Forecast
 - 17.2. □ HONG KONG
 - 17.2.1. □ Market Overview
 - 17.2.2. □ Investment: Market Size & Forecast
 - 17.2.3. □ Area: Market Size & Forecast
 - 17.2.4. □ Power Capacity: Market Size & Forecast
 - 17.2.5. □ Support Infrastructure: Market Size & Forecast
 - 17.2.6. □ Colocation Revenue: Market Size & Forecast
 - 17.3. □ AUSTRALIA
 - 17.3.1. □ Market Overview
 - 17.3.2. □ Investment: Market Size & Forecast
 - 17.3.3. □ Area: Market Size & Forecast
 - 17.3.4. □ Power Capacity: Market Size & Forecast
 - 17.3.5. □ Support Infrastructure: Market Size & Forecast
 - 17.3.6. □ Colocation Revenue: Market Size & Forecast
 - 17.4. □ NEW ZEALAND
 - 17.4.1. □ Market Overview
 - 17.4.2. □ Investment: Market Size & Forecast
 - 17.4.3. □ Area: Market Size & Forecast
 - 17.4.4. □ Power Capacity: Market Size & Forecast
 - 17.4.5. □ Support Infrastructure: Market Size & Forecast
 - 17.4.6. □ Colocation Revenue: Market Size & Forecast
 - 17.5. □ INDIA
 - 17.5.1. □ Market Overview
 - 17.5.2. □ Investment: Market Size & Forecast
 - 17.5.3. □ Area: Market Size & Forecast
 - 17.5.4. □ Power Capacity: Market Size & Forecast

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- 17.5.5.□Support Infrastructure: Market Size & Forecast
- 17.5.6.□Colocation Revenue: Market Size & Forecast
- 17.6.□JAPAN
 - 17.6.1.□Market Overview
 - 17.6.2.□Investment: Market Size & Forecast
 - 17.6.3.□Area: Market Size & Forecast
 - 17.6.4.□Power Capacity: Market Size & Forecast
 - 17.6.5.□Support Infrastructure: Market Size & Forecast
 - 17.6.6.□Colocation Revenue: Market Size & Forecast
- 17.7.□TAIWAN
 - 17.7.1.□Market Overview
 - 17.7.2.□Investment: Market Size & Forecast
 - 17.7.3.□Area: Market Size & Forecast
 - 17.7.4.□Power Capacity: Market Size & Forecast
 - 17.7.5.□Support Infrastructure: Market Size & Forecast
 - 17.7.6.□Colocation Revenue: Market Size & Forecast
- 17.8.□SOUTH KOREA
 - 17.8.1.□Market Overview
 - 17.8.2.□Investment: Market Size & Forecast
 - 17.8.3.□Area: Market Size & Forecast
 - 17.8.4.□Power Capacity: Market Size & Forecast
 - 17.8.5.□Support Infrastructure: Market Size & Forecast
 - 17.8.6.□Colocation Revenue: Market Size & Forecast
- 17.9.□REST OF APAC
 - 17.9.1.□Market Overview
 - 17.9.2.□Investment: Market Size & Forecast
 - 17.9.3.□Area: Market Size & Forecast
 - 17.9.4.□Power Capacity: Market Size & Forecast
 - 17.9.5.□Support Infrastructure: Market Size & Forecast
 - 17.9.6.□Colocation Revenue: Market Size & Forecast
- 17.10.□SOUTHEAST ASIA
 - 17.10.1.□Market Overview
 - 17.10.2.□Investment: Market Size & Forecast
 - 17.10.3.□Area: Market Size & Forecast
 - 17.10.4.□Power Capacity: Market Size & Forecast
 - 17.10.5.□Support Infrastructure: Market Size & Forecast
 - 17.10.6.□Colocation Revenue: Market Size & Forecast
- 17.11.□SINGAPORE
 - 17.11.1.□Market Overview
 - 17.11.2.□Investment: Market Size & Forecast
 - 17.11.3.□Area: Market Size & Forecast
 - 17.11.4.□Power Capacity: Market Size & Forecast
 - 17.11.5.□Support Infrastructure: Market Size & Forecast
 - 17.11.6.□Colocation Revenue: Market Size & Forecast
- 17.12.□INDONESIA
 - 17.12.1.□Market Overview
 - 17.12.2.□Investment: Market Size & Forecast

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- 17.12.3.□Area: Market Size & Forecast
- 17.12.4.□Power Capacity: Market Size & Forecast
- 17.12.5.□Support Infrastructure: Market Size & Forecast
- 17.12.6.□Colocation Revenue: Market Size & Forecast
- 17.13.□MALAYSIA
- 17.13.1.□Market Overview
- 17.13.2.□Investment: Market Size & Forecast
- 17.13.3.□Area: Market Size & Forecast
- 17.13.4.□Power Capacity: Market Size & Forecast
- 17.13.5.□Support Infrastructure: Market Size & Forecast
- 17.13.6.□Colocation Revenue: Market Size & Forecast
- 17.14.□THAILAND
- 17.14.1.□Market Overview
- 17.14.2.□Investment: Market Size & Forecast
- 17.14.3.□Area: Market Size & Forecast
- 17.14.4.□Power Capacity: Market Size & Forecast
- 17.14.5.□Support Infrastructure: Market Size & Forecast
- 17.14.6.□Colocation Revenue: Market Size & Forecast
- 17.15.□PHILIPPINES
- 17.15.1.□Market Overview
- 17.15.2.□Investment: Market Size & Forecast
- 17.15.3.□Area: Market Size & Forecast
- 17.15.4.□Power Capacity: Market Size & Forecast
- 17.15.5.□Support Infrastructure: Market Size & Forecast
- 17.15.6.□Colocation Revenue: Market Size & Forecast
- 17.16.□VIETNAM
- 17.16.1.□Market Overview
- 17.16.2.□Investment: Market Size & Forecast
- 17.16.3.□Area: Market Size & Forecast
- 17.16.4.□Power Capacity: Market Size & Forecast
- 17.16.5.□Support Infrastructure: Market Size & Forecast
- 17.16.6.□Colocation Revenue: Market Size & Forecast
- 17.17.□OTHER SOUTHEAST ASIAN COUNTRIES
- 17.17.1.□Market Overview
- 17.17.2.□Investment: Market Size & Forecast
- 17.17.3.□Area: Market Size & Forecast
- 17.17.4.□Power Capacity: Market Size & Forecast
- 17.17.5.□Support Infrastructure: Market Size & Forecast
- 17.17.6.□Colocation Revenue: Market Size & Forecast
- 18.□COMPETITIVE LANDSCAPE
- 18.1.□MARKET SHARE BY COLOCATION INVESTMENT
- 18.2.□MARKET SHARE BY COLOCATION AREA
- 18.3.□MARKET SHARE BY COLOCATION POWER
- 18.4.□MARKET SHARE BY COLOCATION REVENUE
- 19.□PROMINENT DATA CENTER INVESTORS
- 19.1.□AIRTRUNK
- 19.1.1.□Business Overview

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- 19.1.2.□Service Offerings
- 19.2.□BIG DATA EXCHANGE
 - 19.2.1.□Business Overview
 - 19.2.2.□Service Offerings
- 19.3.□CDC DATA CENTRES
 - 19.3.1.□Business Overview
 - 19.3.2.□Service Offerings
- 19.4.□CHAYORA
 - 19.4.1.□Business Overview
 - 19.4.2.□Service Offerings
- 19.5.□CHINDATA GROUP
 - 19.5.1.□Business Overview
 - 19.5.2.□Service Offerings
- 19.6.□COLT DATA CENTRE SERVICES
 - 19.6.1.□Business Overview
 - 19.6.2.□Service Offerings
- 19.7.□CTRLS DATACENTERS
 - 19.7.1.□Business Overview
 - 19.7.2.□Service Offerings
- 19.8.□DIGITAL EDGE DC
 - 19.8.1.□Business Overview
 - 19.8.2.□Service Offerings
- 19.9.□DIGITAL REALTY
 - 19.9.1.□Business Overview
 - 19.9.2.□Service Offerings
- 19.10.□EQUINIX
 - 19.10.1.□Business Overview
 - 19.10.2.□Service Offerings
- 19.11.□GDS SERVICES
 - 19.11.1.□Business Overview
 - 19.11.2.□Service Offerings
- 19.12.□IRON MOUNTAIN
 - 19.12.1.□Business Overview
 - 19.12.2.□Service Offerings
- 19.13.□KEPPEL DATA CENTRES
 - 19.13.1.□Business Overview
 - 19.13.2.□Service Offerings
- 19.14.□LG UPLUS
 - 19.14.1.□Business Overview
 - 19.14.2.□Service Offerings
- 19.15.□NEXTDC
 - 19.15.1.□Business Overview
 - 19.15.2.□Service Offerings
- 19.16.□NTT DATA
 - 19.16.1.□Business Overview
 - 19.16.2.□Service Offerings
- 19.17.□NXTRA BY AIRTEL

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- 19.17.1.□Business Overview
- 19.17.2.□Service Offerings
- 19.18.□ONEASIA NETWORK
- 19.18.1.□Business Overview
- 19.18.2.□Service Offerings
- 19.19.□OPEN DC
- 19.19.1.□Business Overview
- 19.19.2.□Service Offerings
- 19.20.□PI DATACENTERS
- 19.20.1.□Business Overview
- 19.20.2.□Service Offerings
- 19.21.□PRINCETON DIGITAL GROUP
- 19.21.1.□Business Overview
- 19.21.2.□Service Offerings
- 19.22.□REGAL ORION
- 19.22.1.□Business Overview
- 19.22.2.□Service Offerings
- 19.23.□SPACEDC
- 19.23.1.□Business Overview
- 19.23.2.□Service Offerings
- 19.24.□ST TELEMEDIA GLOBAL DATA CENTRES
- 19.24.1.□Business Overview
- 19.24.2.□service Offerings
- 19.25.□SUNEVISION HOLDINGS (IADVANTAGE)
- 19.25.1.□Business Overview
- 19.25.2.□Service Offerings
- 19.26.□SIFY TECHNOLOGIES
- 19.26.1.□Business Overview
- 19.26.2.□Service Offerings
- 19.27.□TENGLONG HOLDING GROUP
- 19.27.1.□Business Overview
- 19.27.2.□Service Offerings
- 19.28.□VIETTEL IDC
- 19.28.1.□Business Overview
- 19.28.2.□Service Offerings
- 19.29.□VNET
- 19.29.1.□Business Overview
- 19.29.2.□Service Offerings
- 19.30.□YOTTA INFRASTRUCTURE SOLUTIONS
- 19.30.1.□Business Overview
- 19.30.2.□Service Offerings
- 20.□NEW ENTRANTS
- 20.1.□ADANICONNEX
- 20.1.1.□Business Overview
- 20.1.2.□Service Offerings
- 20.2.□DATA CENTER FIRST
- 20.2.1.□Business Overview

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20.2.2.	Service Offerings
20.3.	EDGE CENTRES
20.3.1.	Business Overview
20.3.2.	Service Offerings
20.4.	EDGECONNEX (EQT INFRASTRUCTURE)
20.4.1.	Business Overview
20.4.2.	Service Offerings
20.5.	EVOLUTION DATA CENTRES
20.5.1.	Business Overview
20.5.2.	Service Offerings
20.6.	HICKORY
20.6.1.	Business Overview
20.6.2.	Service Offerings
20.7.	METTADC
20.7.1.	Business Overview
20.7.2.	Service Offerings
20.8.	NAUTILUS DATA TECHNOLOGIES
20.8.1.	Business Overview
20.8.2.	Service Offerings
20.9.	PURE DATA CENTRES
20.9.1.	Business Overview
20.9.2.	Service Offerings
20.10.	VANTAGE DATA CENTERS
20.10.1.	Business Overview
20.10.2.	Service Offerings
20.11.	YCO CLOUD
20.11.1.	Business Overview
20.11.2.	Service Offerings
20.12.	YTL DATA CENTER
20.12.1.	Business Overview
20.12.2.	Service Offerings
20.13.	YONDR
20.13.1.	Business Overview
20.13.2.	Service Offerings
21.	QUANTITATIVE SUMMARY
21.1.	APAC DATA CENTER COLOCATION MARKET
21.1.1.	Overview: Market Size & Forecast
21.1.2.	Support Infrastructure: Market Size & Forecast
21.2.	MARKET BY SEGMENT
21.2.1.	Colocation Service: Market Size & Forecast
21.2.2.	Electrical Infrastructure: Market Size & Forecast
21.2.3.	Mechanical Infrastructure: Market Size & Forecast
21.2.4.	Cooling Systems: Market Size & Forecast
21.2.5.	Cooling Techniques: Market Size & Forecast
21.2.6.	General Construction: Market Size & Forecast
21.2.7.	Tier Standards: Market Size & Forecast
21.3.	MARKET BY GEOGRAPHY

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- 21.3.1.□Investment: Market Size & Forecast
- 21.3.2.□Area: Market Size & Forecast
- 21.3.3.□Power Capacity: Market Size & Forecast
- 21.3.4.□Colocation Revenue: Market Size & Forecast
- 21.4.□CHINA
- 21.4.1.□Investment: Market Size & Forecast
- 21.4.2.□Support Infrastructure: Market Size & Forecast
- 21.4.3.□Colocation Service: Market Size & Forecast
- 21.5.□HONG KONG
- 21.5.1.□Investment: Market Size & Forecast
- 21.5.2.□Support Infrastructure: Market Size & Forecast
- 21.5.3.□Colocation Service: Market Size & Forecast
- 21.6.□AUSTRALIA
- 21.6.1.□Investment: Market Size & Forecast
- 21.6.2.□Support Infrastructure: Market Size & Forecast
- 21.6.3.□Colocation Service: Market Size & Forecast
- 21.7.□NEW ZEALAND
- 21.7.1.□Investment: Market Size & Forecast
- 21.7.2.□Support Infrastructure: Market Size & Forecast
- 21.8.□INDIA
- 21.8.1.□Investment: Market Size & Forecast
- 21.8.2.□Support Infrastructure: Market Size & Forecast
- 21.8.3.□Colocation Service: Market Size & Forecast
- 21.9.□JAPAN
- 21.9.1.□Investment: Market Size & Forecast
- 21.9.2.□Support Infrastructure: Market Size & Forecast
- 21.9.3.□Colocation Service: Market Size & Forecast
- 21.10.□SOUTH KOREA
- 21.10.1.□Investment: Market Size & Forecast
- 21.10.2.□Support Infrastructure: Market Size & Forecast
- 21.10.3.□Colocation Service: Market Size & Forecast
- 21.11.□TAIWAN
- 21.11.1.□Investment: Market Size & Forecast
- 21.11.2.□Support Infrastructure: Market Size & Forecast
- 21.11.3.□Colocation Service: Market Size & Forecast
- 21.12.□REST OF APAC
- 21.12.1.□Investment: Market Size & Forecast
- 21.12.2.□Support Infrastructure: Market Size & Forecast
- 21.13.□SOUTHEAST ASIA
- 21.13.1.□Investment: Market Size & Forecast
- 21.13.2.□Support Infrastructure: Market Size & Forecast
- 21.13.3.□Colocation Service: Market Size & Forecast
- 21.14.□MARKET BY SOUTHEAST ASIA
- 21.14.1.□Investment: Market Size & Forecast
- 21.14.2.□Area: Market Size & Forecast
- 21.14.3.□Power Capacity: Market Size & Forecast
- 21.14.4.□Colocation Revenue: Market Size & Forecast

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21.15.	SINGAPORE
21.15.1.	Investment: Market Size & Forecast
21.15.2.	Support Infrastructure: Market Size & Forecast
21.15.3.	Colocation Service: Market Size & Forecast
21.16.	INDONESIA
21.16.1.	Investment: Market Size & Forecast
21.16.2.	Support Infrastructure: Market Size & Forecast
21.16.3.	Colocation Service: Market Size & Forecast
21.17.	MALAYSIA
21.17.1.	Investment: Market Size & Forecast
21.17.2.	Support Infrastructure: Market Size & Forecast
21.17.3.	Colocation Service: Market Size & Forecast
21.18.	THAILAND
21.18.1.	Investment: Market Size & Forecast
21.18.2.	Support Infrastructure: Market Size & Forecast
21.18.3.	Colocation Service: Market Size & Forecast
21.19.	PHILIPPINES
21.19.1.	Investment: Market Size & Forecast
21.19.2.	Support Infrastructure: Market Size & Forecast
21.19.3.	Colocation Service: Market Size & Forecast
21.20.	VIETNAM
21.20.1.	Investment: Market Size & Forecast
21.20.2.	Support Infrastructure: Market Size & Forecast
21.21.	OTHER SOUTHEAST ASIAN COUNTRIES
21.21.1.	Investment: Market Size & Forecast
21.21.2.	Support Infrastructure: Market Size & Forecast
22.	APPENDIX
22.1.	LIST OF ABBREVIATIONS
22.2.	SITE SELECTION CRITERIA
22.3.	CURRENCY CONVERSION

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