

GCC Data Center Market - Investment Analysis & Growth Opportunities 2025-2030

Market Report | 2025-03-11 | 225 pages | Arizton Advisory & Intelligence

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Report description:

The GCC data center market is expected to grow at a CAGR of 18.19% from 2024 to 2030.

KEY HIGHLIGHTS

- The Gulf Cooperation Council (GCC) nations are witnessing a significant transformation in data governance, driven by rapid digitalization and countries like the UAE, Saudi Arabia, and Qatar are introducing strict data protection regulations to address concerns over cybersecurity, privacy, and economic sovereignty.
- In January 2024, the implementation of Saudi Arabia's "Data Centre Services Regulations" supports the Kingdom's Vision 2030 by fostering sustainable digital infrastructure to attract investment and meet the demands of its tech-savvy, youthful population.
- Considering its economic vision and technological innovations, Saudi Arabia is becoming a key player in the Middle East's digital transformation, attracting international companies and investments. The ambitious Vision 2030 initiatives, strategic position, and growing technology ecosystem of the nation are driving the data center market's potential for substantial expansion. Businesses and industries making the shift to technological-first operations have access to support throughout the Kingdom because of government-supported programs to increase internet penetration and promote digital accessibility.
- LEAP Riyadh 2025 is anticipated to significantly transform the technological landscape and data center market in Saudi Arabia through substantial investments and innovative initiatives. This event will act as a platform for the shift in market dynamics, fostering growth and advancements in the upcoming years. As a result, we can expect the establishment of cutting-edge technologies, increased collaboration among industry players, and an overall enhancement of the digital infrastructure in the region. The initiatives launched during LEAP will likely attract global attention, paving the way for new opportunities and positioning Saudi Arabia as a key player in the tech industry on an international scale.

WHY SHOULD YOU BUY THIS RESEARCH?

- Market size available in the investment, area, power capacity, and GCC colocation market revenue.
- An assessment of the data center investment in GCC by colocation, hyperscale, and enterprise operators.

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- Data center investments in the area (square feet) and power capacity (MW) across cities in the country.
- A detailed study of the existing GCC data center market landscape, an in-depth market analysis, and insightful predictions about the GCC data center market size during the forecast period.
- Snapshot of existing and upcoming third-party data center facilities in GCC
 - o□Facilities Covered (Existing): 92
 - o□Facilities Identified (Upcoming): 83
 - o□Coverage: 6 Countries
 - o□Existing vs. Upcoming (Data Center Area)
 - o□Existing vs. Upcoming (IT Load Capacity)
- Data center colocation market in GCC
 - o□Colocation Revenue: Market Size & Forecast 2021-2030
 - o□Retail Vs Wholesale Colocation Revenue: Market Size & Forecast 2021-2030
- The GCC data center market's landscape 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 industry.

VENDOR LANDSCAPE

- The GCC data center market features several major data center operators, such as Equinix, Gulf Data Hub, Khazna Data Centers, Edgnex Data Centres by DAMAC, Batelco, Ooredoo, Mobily, Moro Hub, and Quantum Switch Tamasuk, which have established facilities and plan further investments. In addition, the GCC data center market witnesses new announcements and investments from emerging operators, which include Agility, DataVolt, Desert Dragon Data Centers, Pure Data Centres, Sahayeb Datacenters, and others.
- The GCC data center market is also seeing investments from global cloud giants such as Google, Amazon Web Services, Microsoft, Oracle, Alibaba, and Huawei who are developing their own dedicated cloud regions and data centers throughout the country. They have their cloud regions spread across Dubai, Abu Dhabi, Riyadh, Jeddah, Dammam, Doha, and Manama.
- In October 2024, Khazna Data Centers announced its plan to develop a new AI-optimized data center facility in Ajman, UAE. The data center is to feature 20 data halls, with the first phase likely to go online by 2026.

EXISTING VS. UPCOMING DATA CENTERS

- Existing Facilities in the Region (Area and Power Capacity)
 - o□UAE
 - o□Saudi Arabia
 - o□Bahrain
 - o□Oman
 - o□Kuwait
 - o□Qatar
- List of Upcoming Facilities in the Region (Area and Power Capacity)

IT Infrastructure Providers

- Arista Networks

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- []Atos
- []Broadcom
- []Cisco Systems
- []Dell Technologies
- []Fujitsu
- []Hewlett Packard Enterprise
- []Hitachi Vantara
- []Huawei Technologies
- []IBM
- []Inspur
- []Lenovo
- []NetApp
- []Oracle

Data Center Construction Contractors & Sub-Contractors

- []AECOM
- []AESG
- []Al-Balagh Trading and Contracting Co. WLL
- []Aldar
- []Al Latifia Trading & Contracting Co
- []ALEC Engineering & Contracting
- []Arcadis
- []Arup
- []Ashi & Bushnag Co.
- []ASU
- []AtkinsRealis
- []BG&E
- []Black & White Engineering
- []CADD Emirates
- []Capitoline
- []Condor Group
- []Core Emirates
- []Critical Facilities Consulting & Services
- []Dar
- []DC PRO Engineering
- []Direct Services
- []Edarat Group
- []EGEC
- []EGIS
- []Exyte
- []Galfar Al Misnad
- []Group AMANA
- []HATCO
- []HHM Group
- []Hill International
- []ICS Nett

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- INT'LTEC GROUP
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- Marafie Group
- McLaren Construction Group
- Meinhardt Group
- MEMA Architecture
- MIS - Al Moammar Information Systems
- Qatar Site & Power
- Raghav Contracting
- Red Engineering Design
- Rider Levett Bucknall
- RW Armstrong
- SANA Creative Systems
- Site & Power DK
- STS Group
- Sudlows
- Syska Hennessy Group
- Telal Engineering & Contracting
- Turner & Townsend
- UBIK
- Jacobs

Support Infrastructure Providers

- ABB
- Airedale
- Alfa Laval
- Canovate
- Caterpillar
- Chatsworth Products
- Cummins
- Delta Electronics
- Eaton
- Envicool
- Enrogen
- Grundfos
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Data Center Investors

- []Amazon Web Services
- []Batelco
- []Core42
- []Center3
- []du
- []Edgnex Data Centres by DAMAC
- []Equinix
- []Google
- []Khazna Data Centers
- []Gulf Data Hub
- []KEMS Zajil Telecom
- []MEEZA
- []Moro Hub
- []Microsoft
- []Mobily
- []Oman Data Park
- []Ooredoo
- []Pacific Controls
- []Quantum Switch Tamasuk
- []stc
- []Tonomus
- []Zain

New Entrants

- []Agility
- []DataVolt
- []Desert Dragon Data Centers
- []Pure Data Centres
- []Qareeb Data Centres
- []Sahayeb Datacenters

REPORT COVERAGE:

This report analyzes the GCC data center market share. It elaborately 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:

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 - oStorage Infrastructure
 - oNetwork Infrastructure
- Electrical Infrastructure
 - oUPS Systems
 - oGenerators
 - oTransfer Switches & Switchgears
 - oPDUs
 - oOther Electrical Infrastructure
- Mechanical Infrastructure
 - oCooling Systems
 - oRack
 - oOther Mechanical Infrastructure
- Cooling Systems
 - oCRAC and CRAH Units
 - oChillers Units
 - oCooling Towers, Condensers and Dry Coolers
 - oOther Cooling Units
- Cooling Techniques
 - oAir-based Cooling
 - oLiquid-based Cooling
- 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
- Geography
 - oUAE
 - oSaudi Arabia
 - oBahrain
 - oOman
 - oKuwait
 - oQatar

KEY QUESTIONS ANSWERED:

1. How big is the GCC data center market?
2. What is the growth rate of the GCC data center market?
3. What factors are driving the GCC data center market?
4. How much MW of power capacity will be added across the GCC during 2025-2030?

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5. Which countries are included in the GCC data center market report?

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