Global Data Center Construction Market - Investment Prospects In 9 Regions And 53 Countries

Market Report | 2025-05-02 | 543 pages | Arizton Advisory & Intelligence

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Report description:

The global data center construction market by investment is expected to grow at a CAGR of 15.15% from 2024 to 2030.

DATA CENTER CONSTRUCTION MARKET TRENDS

-Artificial Intelligence is driving a huge demand for data centers around the world. To meet this need, leading cloud providers and technology companies are expanding into new regions to build and operate their data center facilities.
-The significant adoption of AI is transforming various industries, offering enhanced efficiency and functionality in areas like finance and healthcare. To support the demands of AI and ML workloads, data centers increasingly rely on liquid-based cooling systems, which effectively manage the substantial heat produced by high-performance hardware.
-The U.S. and China are continuing to lead in terms of data center investments. This includes the implementation of stronger expansion strategies into Tier II and Tier III cities across major data center hubs.
-APAC is among the fastest-growing regions for the development of data centers, with Malaysia, India, Japan, South Korea, Australia, and Indonesia contributing heavily to the expansion of data center capacity.
-In Western Europe, the FLAP-D market is witnessing significant investments from local and global hyperscale companies, and this trend is also shifting rapidly towards secondary European data center markets like Spain, Norway, Italy, and Portugal.
-With an increasing focus on environmental sustainability, data center operators are increasingly embracing sustainable practices for the construction of their facilities. Investments in the development of sustainable data centers will increase significantly with all the upcoming data center facilities incorporating renewable energy sources and energy-efficient infrastructure solutions.

GLOBAL DATA CENTER CONSTRUCTION MARKET DRIVERS

-The global data center construction market has seen a significant increase in the adoption of cloud computing services, resulting in the development of large-scale hyperscale cloud data centers. This shift toward cloud computing is transforming the landscape

of data center facilities, driving innovation and the integration of advanced infrastructure. The emergence of Artificial Intelligence has further increased the demand from hyperscale providers.
-The use of cloud-based services has seen substantial growth, led by major global cloud providers like Google, Amazon Web Services, Microsoft, Alibaba, Oracle, Tencent, and IBM. This surge is particularly seen across regions such as APAC, the Middle East, Africa, and Europe, fueled by the digital transformation of businesses and the development of hyperscale cloud data centers. Global cloud giants, including Google, AWS, and Microsoft, are heavily investing in these regions. These companies are expanding their operations across various locations worldwide with the development of large-scale data center facilities.
-Data center growth is seen in countries offering tax incentives, making them attractive for expansion. Governments provide benefits like property tax breaks, investment credits, and sales tax exemptions to lower operational costs.

SEGMENTATION INSIGHTS

-The global data center construction market is evolving with unique trends across different regions. In North America, there's a strong focus on using energy-efficient and modular infrastructure to save costs. Sustainability is becoming a major priority, with new power and cooling technologies being used to lower environmental impact.
-In Western Europe, new technologies like district heating are being adopted to support sustainability goals. Central and Eastern Europe is focusing on introducing modular power systems, along with improvements in cooling, fire safety, and heating technologies to boost efficiency.
-In the Middle East, data center operators are focusing on efficient cooling systems and cleaner energy sources like EcoDiesel and natural gas. Physical security and fire safety are also important to keep operations running smoothly. In Africa, more Tier III and IV data centers are being built, with a strong focus on reliability and performance. The APAC region is seeing rapid growth in colocation and hyperscale data centers, supported by new investments and technology. Due to high temperatures and limited water, air-based cooling methods are commonly used, and liquid-based technologies are gaining traction to manage the heat loads generated by AI and HPC workloads.
-North America has emerged as the strongest growing region in terms of cumulative investment in the data center construction market from 2021 to 2030. North America witnessed consistent growth across all segments, including electrical infrastructure, mechanical infrastructure, and general construction.
-The Middle East and Africa are becoming a key emerging region in the global data center construction market. Although it started with lower investment levels compared to other regions, it shows strong growth across multiple locations, leading to increased investment in data center infrastructure.

The report includes the investment in the following areas:

-Segmentation by Facility Type
oHyperscale Data Centers
oColocation Data Centers
oEnterprise Data Centers
-Segmentation by Infrastructure
oElectrical Infrastructure
oMechanical Infrastructure
oGeneral Construction
-Segmentation by Electrical Infrastructure
oUPS Systems
oGenerators
oTransfer Switches & Switchgears
oPDUs
oOther Electrical Infrastructure

-Segmentation by Mechanical Infrastructure
oCooling Systems
oRacks
oOther Mechanical Infrastructure
-Segmentation by Cooling Systems
oCRAC & CRAH Units
oChiller Units
oCooling Towers, Condensers, & Dry Coolers
oOther Cooling Units
-Segmentation by Cooling Technique
oAir-based Cooling
oLiquid-based Cooling
-Segmentation by General Construction
oCore & Shell Development
oInstallation & Commissioning Services
oEngineering & Building Design
oFire Detection & Suppression
oPhysical Security
oDCIM/BMS Solutions
-Segmentation by Tier Standards
oTier I & Tier II
oTier III
oTier IV

Segmentation by Geography

-North America
-The U.S.
-Canada
-Latin America
-Brazil
-Mexico
-Chile
-Colombia
-Argentina
-Rest of Latin America
-Western Europe
-The U.K.
-Germany
-France
-Netherlands
-Ireland
-Switzerland
-Italy
-Spain
-Belgium
-Portugal

-Greece
-Other Western European Countries
-Nordics
-Sweden
-Norway
-Denmark
-Finland
-Iceland
-Central & Eastern Europe
-Russia
-Poland
-Austria
-Czechia
-Other Central & Eastern European Countries
-Middle East
-UAE
-Saudi Arabia
-Israel
-Oman
-Qatar
-Jordan
-Bahrain
-Kuwait
-Other Middle East Countries
-Africa
-South Africa
-Kenya
-Nigeria
-Egypt
-Other African Countries
-APAC
-China
-Hong Kong
-Australia
-New Zealand
-Japan
-India
-South Korea
-Taiwan
-Rest of APAC
-Southeast Asia
-Singapore
-Indonesia
-Malaysia
-Thailand
-Philippines
-Vietnam

-Other Southeast Asia Countries

DATA CENTER CONSTRUCTION MARKET GEOGRAPHICAL ANALYSIS

The U.S. Leads the Global Data Center Construction Market

-North America leads the global data center construction market in terms of investment, with consistent yearly growth. From 2024 to 2030, North America is expected to witness growth with an absolute growth rate of over 133%. The data center construction market in North America encompasses the United States and Canada, which are experiencing substantial growth driven by significant investments across various locations. In the United States, locations like Northern Virginia and Georgia have become preferable locations for data center development. Major players such as AWS, Google, Meta, and Microsoft are committing billions of dollars to expand their presence across these locations. Similarly, in the Midwestern U.S., states like Ohio, Illinois, and Missouri are witnessing a surge in investments from hyperscale operators like Meta, Google, and Microsoft, transforming cities like Chicago and Columbus into key data center hubs. Texas and Arizona in the Southwestern U.S. are also emerging as major data center markets, with tech giants like Google and QTS Realty Trust expanding their footprints, driven by favorable economic conditions and tax incentives. The Western U.S., with states like California and Oregon, is seeing significant developments propelled by the presence of major hyperscale operators and the increasing demand for digital infrastructure.
-Northern Virginia leads the U.S. data center construction market. Other major locations include Texas, California, Arizona, and New York/New Jersey, attracting colocation and hyperscale players. Factors like strong connectivity, renewable energy access, and tax benefits drive growth, with states like Texas and Georgia seeing rapid expansion.
-Canada's data center construction market is expanding rapidly, fueled by low electricity costs, renewable energy access, and government incentives. Quebec and Toronto are key hubs, attracting major cloud providers like Amazon, Google, and Microsoft.

APAC Emerging as a Key Player in the Data Center Construction Market

-APAC is emerging as a key data center construction market, experiencing substantial growth in investment during the forecast period. With an absolute growth rate of over 101%, APAC is witnessing robust development driven by countries such as China, India, and Singapore. Adopting artificial intelligence (AI) and increasing investments from data center operators contribute to the region's growth trajectory.
-The APAC data center construction market witnessed a significant rise in investments, driven by factors like increased internet usage, greater social media engagement, increased usage of smartphones, and a growing shift to cloud services. In 2024, major players such as GDS Services, SUNeVision Holdings, China Mobile, Equinix, Digital Realty, EdgeConneX, Keppel Data Centres, NEXTDC, AirTrunk, ST Telemedia Global Data Centres, Chindata Group, Edge Centres, ePLDT, Yotta Infrastructure Solutions, AdaniConrieX, Yondr, CDC Data Centres, DCI Indonesia, NTT DATA, Ctrls Datacenters, Princeton Digital Group, and others made substantial investments as key colocation providers in the APAC data center market.
-The Southeast Asia data center construction market is rapidly growing, fueled by the rising adoption of cloud services, AI, Big Data, and IoT technologies. Countries like Singapore, Malaysia, Indonesia, Thailand, the Philippines, and Vietnam have strong connectivity. Malaysia and Indonesia are emerging as key investors, and the investments are expected to increase significantly in the coming years. Singapore also serves as a crucial location for several APAC nations, including Japan, South Korea, Vietnam, and Pakistan.

Emerging Regions Driving Data Center Expansion

-In Latin America, nations like Brazil, Mexico, and Chile are emerging as prominent locations for data center construction. The region is experiencing rapid adoption of advanced technologies such as IoT, Big Data, AI, ML, and cloud-based services, along with the deployment of submarine cables, 5G networks, and increased high-speed internet connectivity Additionally, the growth of digital economy and data localization regulations, like Brazil's Lei Geral de Protecao de Dados Pessoais (LGPD) mandate local data

storage, are boosting data center investments in the region.
-The Middle East, Africa, and parts of Europe, including Western Europe, the Nordics, and Central and Eastern Europe, are witnessing growing investment and expansion in data center infrastructure, establishing themselves as emerging hubs in the global market. For example, the Central & Eastern Europe data center market is rapidly developing, driven by factors like the rise of IoT, the rollout of 5G networks, and the demand for high-speed internet. Increasing data traffic is further fueling the need for more data centers to handle the growing volume of data from businesses and consumers. The continued rise of cloud computing services and applications in the region is expected to lead to the development of larger data centers and support the data center construction market growth.

Global Data Center Construction Market in Terms of Area and Power

-North America continues to lead the data center construction market in terms of area and power capacity, maintaining steady growth. While regions like Latin America, Europe, the Middle East, and Africa are witnessing significant expansion. In North America, data center operators are investing significantly to develop large data center facilities. The locations of the Southeastern U.S., like Virginia and Georgia, witnessed huge investment in land and facility development.
-Latin America is also experiencing rapid growth in data center infrastructure, both in terms of area and power capacity, reflecting increasing demand in the region. The rise of Special Economic Zones (SEZs) and Export Processing Zones (EPZs) across various countries is further supporting data center development. In Brazil, Tambore Business Park in Sao Paulo has emerged as a key hub, hosting major data center operators such as Equinix and Scala Data Centers.
-The Middle East and Africa are also seeing significant growth in power capacity, fueled by investments in smart city projects, renewable energy initiatives, and supportive government policies. The development of Special Economic Zones (SEZs), Free Trade Zones (FTZs), and industrial parks is playing a key role in attracting data center investments across the region. For example, Khazna Data Centers has invested in modular data center projects within the Khalifa Industrial Zone in Abu Dhabi. Additionally, Middle Eastern governments offer tax incentives to promote data center development in FTZs and industrial zones, such as Jordan's 5% property tax exemption. In Africa, companies like Digital Realty and Equinix have entered the market through acquisitions.

Global Data Center Construction Market Poised for Transformation Through Emerging Regions

North America remains the dominant region in terms of data center construction investments. Meanwhile, emerging markets across APAC, Latin America, Europe, and MEA are showing strong potential for future growth. Driven by advancements in technology, supportive government policies, and rising demand for digital infrastructure, these regions are well-positioned to transform the global data center construction market in the forecast period.

VENDOR LANDSCAPE

-The global data center construction market is witnessing strong expansion across various regions, fueled by the rising need for advanced data infrastructure.
-In North America, leading construction firms in the data center construction market, like AECOM, Arup, Jacobs, and Turner Construction, are benefiting significantly, driven by the expansion of major colocation providers such as Equinix, Digital Realty, and CyrusOne. Additionally, hyperscalers like Amazon Web Services (AWS) and Microsoft are rapidly increasing their presence, especially in areas like Northern Virginia and Texas. Emerging players such as Corscale Data Centers and Skybox Datacenters are developing their data center facilities significantly across various locations in North America.
-Latin America offers an evolving data center construction market, with both established firms and new entrant's presence. Leading contractors like AECOM and Afonso Franca Engenharia are driving major projects, while colocation providers such as Ascenty and ODATA are actively expanding their facilities in the regional data center construction market. Support infrastructure companies, including ABB, Airedale, and Vertiv, are playing a vital role in enabling construction and ensuring operational

efficiency across the region. The new entrants like CloudHQ are increasing growth opportunities and potential market disruption.
- In Western Europe, contractors in the data center construction market, such as Arup, AECOM, Bouygues Construction, Collen Construction, HDR Architecture, Mercury, and Winthrop Technologies, are some of the prominent construction companies. The development of data centers is driven by prominent colocation providers like Colt Data Centre Services, Equinix, and Digital Realty. Hyperscale companies like Microsoft and Meta (Facebook) are making significant investments, further increasing the demand for construction expertise. The entry of emerging developers like Global Technical Realty, Form8tion Data Centers, and EDGNEX Data Centers by DAMAC is further driving the data center construction market with the development of their new facilities.
- The Nordic region stands out in the data center construction market through its emphasis on sustainability and innovation. Prominent contractors such as Arup and Designer Group partner with major colocation providers like Equinix and Digital Realty to build advanced data center facilities. The naturally cool climate offers energy-efficient cooling benefits, making the region a preferred choice for hyperscale players like Google and Microsoft. Infrastructure vendors, including ABB and Alfa Laval, play a key role in delivering efficient support infrastructure for data center operations.
- Central and Eastern Europe (CEE) has the presence of prominent construction contractors and colocation providers. Infrastructure vendors like Schneider Electric and Rittal are delivering infrastructure solutions, supporting the region's rapid data center development. Established colocation players such as Rostelecom and Equinix are developing their facilities, while companies like 3data and Atman are expanding their footprint. The region's strategic position and expanding digital landscape enhance its appeal for data center investments.
- The Middle East and Africa provide fertile ground for the expansion of data center facilities. Prominent firms like AECOM and ENMAR Engineering are involved in major developments, while key colocation players such as Gulf Data Hub and Equinix lead in building new facilities. Infrastructure support from vendors like ABB and Schneider Electric is essential to maintain efficient operations across the region. The new entrants like Cloudnoon and EDGNEX Data Centres by DAMAC are accelerating data center construction market growth.
- In the APAC region, construction contractors and colocation providers are leveraging the region's digital growth. Hyperscale giants like AWS and Google are investing significantly in the development of large hyperscale data centers. Prominent construction contractors like Turner and Townsend, Arup, and HDR Architecture provide construction, installation, commissioning, and engineering services for the construction of data center facilities across various locations of the region.

Prominent Support Infrastructure Providers

- ABB
- Caterpillar
- Cummins
- Delta Electronics
- EATON
- Johnson Controls
- Kohler (Rehlko)
- Legrand
- Rittal
- Rolls-Royce
- Schneider Electric
- STULZ
- Vertiv

Other Support Infrastructure Providers

- 3M

-Airedale
-Alfa Laval
-Asetek
-Assa Abloy
-Asperitas
-Bloom Energy
-Carrier
-Condair Group
-CoolIT Systems
-Cormant
-Cyber Power Systems
-Daikin Applied
-DCX LIQUID COOLING SYSTEMS
-Enlogic
-FNT Software
-Generac Power Systems
-GIGABYTE
-Green Revolution Cooling
-HITEC Power Protection
-Honeywell
-Iceotope
-KyotoCooling
-LiquidStack
-Mitsubishi Electric
-Munters
-Natron Energy
-NetZoom
-Nlyte Software
-Panduit
-Pillar Power Systems
-Siemens
-Submer
-Toshiba
-Trane Technologies
-Yanmar
-ZincFive

Prominent Data Center Construction Contractors

-AECOM
-Arup
-Corgan
-DPR Construction
-Fortis Construction
-Holder Construction
-Jacobs
-Mercury

-RED Engineering Design
-Syska Hennessy Group
-Turner Construction
-Turner & Townsend

Other Data Center Construction Contractors

-AtkinsRealis
-Aurecon Group
-Basler & Hofmann
-CAP INGELEC
-Collen Construction
-COWI
-Dornan
-DSCO Group
-Edarat Group
-EMCOR Group
-Ethos Engineering
-EYP Mission Critical Facilities
-Flour Corporation
-Gensler
-Gilbane Building Company
-HDR Architecture
-HITT Contracting
-Hoffmann Construction
-ISG
-Kirby Group Engineering
-Laing O'Rourke
-Linesight
-M+W Group (Exyte)
-Mortenson
-QUARK
-Royal HaskoningDHV
-Skanska
-Sterling and Wilson
-Structure Tone
-Winthrop Technologies

Data Center Investors

-Africa Data Centres
-AirTrunk
-Aligned Data Centers
-Amazon Web Services
-American Tower
-Apple
-Ark Data Centres

-AtlasEdge
-Atman
-atNorth
-Big Data Exchange
-CapitaLand
-CDC Data Centres
-center3
-China Mobile International
-China Telecom
-China Unicom
-Chindata Group
-Chunghwa Telecom
-Cirion Technologies
-CloudHQ
-Cologix
-Colt Data Centre Services
-Compass Data Centers
-CtrlS Datacenters
-CyrusOne
-Data4
-DataBank
-Digital Edge DC
-Digital Realty
-EDGNEX Data Centres by DAMAC
-EdgeConneX
-Elea Data Centers
-ePLDT
-Equinix
-eStruxture Data Centers
-Flexential
-GDS Services
-Global Switch
-Global Technical Realty
-Goodman
-Google
-Green Mountain
-Gulf Data Hub
-H5 Data Centers
-Iron Mountain
-Keppel Data Centres
-Khazna Data Centers
-LG Uplus
-Meta
-Microsoft
-NEXTDC
-NTT DATA
-Nxera

-Nxtra by Airtel
-Ooredoo
-Open Access Data Centres
-PowerHouse Data Centers
-Prime Data Centers
-Princeton Digital Group
-Pure Data Centres
-QTS Realty Trust
-Scala Data Centers
-SDC Capital Partners
-Serverfarm
-ST Telemedia Global Data Centres
-STACK Infrastructure
-SUNeVison Holdings
-Telehouse (KDDI)
-Telkom Indonesia
-Vantage Data Centers
-Viettal IDC
-VIRTUS Data Centres
-Yondr

New Entrants

-247 Data Centers
-5C Data Centers
-Agility
-Anan
-Angelo Gordon
-Apto Data Centre
-Ardent Data Centers
-Art Data Centres
-Beacon AI Centers
-Best Wonder Business
-Blue
-Bluestar Data Centre
-BRIGHT RAY
-BW Digital
-Castle IT
-CleanArc
-CloudBurst Data Centers
-Cloudnoon
-Colovore
-Crane Data Centers
-DATA CASTLE
-DATA for MED
-DataGrid
-dataR

-DataVolt
-Digital Halo
-Digital Reef
-Doma Infrastructure Group
-Eclairion
-Edged Energy
-EdgeNebula
-Energia Group
-Epoch Digital
-Evolution Data Centres
-Evroc
-Fleet Data Centres
-Form8tion Data Centers
-Foundation Data Centers
-FutureData
-Gatineau Data Hub
-Gaw Capital
-GreenScale
-GreenSquareDC
-Hyperco
-Infracrowd Capital
-Ingenostrum
-Kasi Cloud
-KEVLINX
-Keysource and Namsos Datasenter
-Lasercharm
-Latos
-Layer 9 Data Centers
-LogistiX
-Mediterra Data Centers
-Megawide Construction Corporation
-Nation Data Center
-NE Edge
-NED
-Nehos
-Open DC
-PHOCEA DC
-PolarDC
-Prometheus Hyperscale
-Qareeb Data Centres
-Quantum Loophole
-Quetta Data Centers
-Rowan Digital Infrastructure
-SC Zeus Data Centers
-SEAX Global
-SEGRO
-Serve Centric

-Serverz Data Center
-Surfix Data Center
-TA Realty
-Techtonic
-TPC Data Centers
-Trifalga
-YCO Cloud
-PointOne Datacenters

KEY QUESTIONS ANSWERED:

1.How big is the global data center construction market?
2.What is the growth rate of the global data center construction market?
3.What is the estimated market size in terms of area in the global data center construction market by 2030?
4.How many MW of power capacity is expected to reach the global data center construction market by 2030?
5.What are the key trends in the global data center construction market?

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