

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

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Report description:

The Singapore data center market is expected to grow at a CAGR of 5.05% from 2024 to 2030.

KEY HIGHLIGHTS

- Singapore is a key hub for digital infrastructure in the Asia Pacific region, due to its favorable regulatory regime, stable political setup, and comparatively low taxes. Though the country is very small in size, having only 278 square miles of area, the government policies have led to the establishment of more than 70 data centers in the country to date.
- The government is making efforts to provide up to 300 MW of data center capacity in the future, which is likely to be fully committed before construction begins, given the consistently high demand for operating data centers in Singapore. The initial 80 MW allocation is expected to add capacity between 2026 and 2028.
- The Singapore data center market has started witnessing growth in the market after lifting the ban on data center construction. Equinix, Microsoft, GDS Services, and AirTrunk were among the key operators receiving approvals from the government for data centers.
- In August 2024, Princeton Digital Group announced the acquisition of Yahoo's Singapore data center. The facility's total area was 5,400 square meters.
- As per the e-Conomy SEA 2024 report, Singapore ranks among the top countries in the world in terms of AI-related online searches. This reflects the presence of a large, young, and digitally native population that is readily embracing AI-powered solutions. The evolution of new reasoning AI models and the potential shortage in the supply of AI-ready data centers are further boosting the Singapore data center market.
- Since 2018, 80 of the world's top 100 tech companies have established a presence in Singapore, including tech giants like Google, IBM, and Microsoft. Since the COVID-19 pandemic, new-age tech companies such as Zoom, PayPal, Tencent, and Alibaba have established their operations in the country.
- Data centers in Singapore entail high upfront costs, power tariffs, and operational and maintenance-related costs, which have

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made them a capital-intensive investment. Resultantly, collaborations between institutional investors and data center operators to accelerate data center expansion are increasing.

-□The telecom sector accounted for around 12% of the colocation demand in 2024 in Singapore. In 2024, the colocation demand from the BFSI sector was around 11%. The share is likely to decline to around 8% by 2029, owing to the increased cloud migrations and hence, the cloud & IT sector's rising market share.

WHY SHOULD YOU BUY THIS RESEARCH?

-□Market size available in the investment, area, power capacity, and colocation market revenue.

-□Data center investments in the area (thousand square feet) and power capacity (MW) across cities in the country.

-□A detailed study of the existing Singapore data center market landscape, an in-depth market analysis, and insightful predictions about the Singapore data center market size during the forecast period.

-□Snapshot of existing and upcoming third-party data center facilities in Singapore

o□Facilities Covered (Existing): 44

o□Facilities Identified (Upcoming): 05

o□Coverage: 4 Locations

o□Existing vs. Upcoming (Data Center Area)

o□Existing vs. Upcoming (IT Load Capacity)

-□Data center colocation market in Singapore

o□Colocation Market Revenue & Forecast (2021-2030)

o□Wholesale vs. Retail Colocation Revenue (2021-2030)

o□Retail Colocation Pricing

o□Wholesale Colocation Pricing

-□The Singapore data center landscape market investments are classified into IT, electrical, mechanical, 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 market.

-□A transparent research methodology and the analysis of the demand and supply aspects of the market.

SINGAPORE DATA CENTER MARKET VENDOR LANDSCAPE

-□The Singapore data center market has the presence of several local and global data center operators, such as AWS, Microsoft, Meta, Equinix, ST Telemedia, Keppel, Singtel, Princeton Digital Group, Google, and others.

-□The growing adoption of AI is prompting operators to redesign their facilities with liquid cooling systems, enabling customers to support AI workloads. Additionally, as part of sustainability initiatives, the use of HVO (hydrotreated vegetable oil) generators is expected to increase in the Singapore data center market during the forecast period.

-□With the rise in sea levels and the premium growth of space on land, some companies are exploring the concept of floating data centers in the Singapore data center market. For instance, Keppel Data Centres' Floating Data Center Park (FDCP) project alleviates land, water, and energy constraints of traditional data centers. The facility harnesses seawater for cooling, thereby increasing cooling efficiency by up to 80%.

-□The Singapore data center market has started witnessing growth in the market after the government lifted the ban on data center construction in 2022. Equinix, Microsoft, GDS Services, and AirTrunk were among the key operators receiving approvals from the government for data centers.

-□The key local colocation operators in the Singapore data center market include companies such as Keppel Data Centres, ST Telemedia Global Data Centres, Equinix, Digital Realty, StarHub, NeutraDC, Singtel, and NTT Global Data Centers, among others.

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As of December 2024, Singapore has the lowest colocation vacancy rate of around 1.4% in APAC, which is likely to be the same throughout the forecast period.

IT Infrastructure Providers

- [] Arista Networks
- [] Atos
- [] Broadcom
- [] Cisco Systems
- [] Dell Technologies
- [] Hewlett Packard Enterprise
- [] Huawei Technologies
- [] IBM
- [] Inspur
- [] Lenovo
- [] MiTAC Holdings
- [] Quanta Cloud Technology
- [] Wiyynn
- [] NetApp

Data Center Construction Contractors & Sub-Contractors

- [] AECOM
- [] Arup
- [] Aurecon
- [] AtkinsRealis
- [] AWP Architects
- [] Cundall
- [] DSCO Group
- [] Fortis Construction
- [] Gammon Construction
- [] Kienta Engineering Construction
- [] LSK Engineering
- [] Larsen & Toubro
- [] NTT Facilities
- [] PM Group
- [] Sato Kogyo

Support Infrastructure Providers

- [] ABB
- [] Airdale Air Conditioning
- [] Bosch Security Systems
- [] Caterpillar
- [] Cummins
- [] Eaton
- [] Fuji Electric

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- []HITEC Power Protection
- []Kohler
- []Legrand
- []Mitsubishi Electric
- []Nortek Data Center Cooling (DCC)
- []Piller Power Systems
- []Rittal
- []Rolls-Royce
- []Schneider Electric
- []STULZ
- []Vertiv

Data Center Investors

- []AirTrunk
- []Amazon Web Services
- []China Mobile
- []Digital Realty
- []Empyrion Digital
- []Equinix
- []Google
- []Global Switch
- []Iron Mountain
- []Keppel Data Centres
- []Meta
- []Microsoft
- []NTT DATA
- []Princeton Digital Group
- []Singtel
- []ST Telemedia Global Data Centres
- []Telin Singapore

REPORT COVERAGE:

This report analyses the Singapore data center market share. It elaborately analyses the existing and upcoming facilities and investments in IT, electrical, mechanical infrastructure, cooling systems, general construction, and tier standards. It discusses market sizing and investment estimation for different segments. The segmentation includes:

- []IT Infrastructure
 - o[]Server Infrastructure
 - o[]Storage Infrastructure
 - o[]Network Infrastructure
- []Electrical Infrastructure
 - o[]UPS Systems
 - o[]Generators
 - o[]Transfer Switches & Switchgear
 - o[]PDUs

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- o Other Electrical Infrastructure
- Mechanical Infrastructure
- o Cooling Systems
- o Racks
- o Other Mechanical Infrastructure
- Cooling Systems
- o CRAC and CRAH Units
- o Chillers Units
- o Cooling Towers, Condensers, and Dry Coolers
- o Other Cooling Units
- General Construction
- o Core & Shell Development
- o Installation & Commissioning Services
- o Building & Engineering Design
- o Fire Detection & Suppression Systems
- o Physical Security
- o DCIM
- Tier Standard
- o Tier I & Tier II
- o Tier III
- o Tier IV

KEY QUESTIONS ANSWERED:

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

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