Southeast Asia Data Center Market Size to Reach Revenues of over USD 11 Billion by 2026 – Arizton

The Southeast Asia data center market size is expected to reach USD 11 billion by 2026, growing at a CAGR of 8% during the forecast period.

CHICAGO, ILLINOIS, UNITED STATES, April 21, 2021 /EINPresswire.com/ -- In-depth analysis and data-driven insights on the impact of COVID-19 included in this [Southeast Asia data center market](#) report.

The Southeast Asia data center market is expected to grow at a CAGR of approximately 8% during the period 2020−2026.

Key Highlights Offered in the Report:
1. The Southeast Asia market witnessed investments from new entrants such as Stratus DC Management (Singapore and the Philippines), Regal Orion (Malaysia), and Kepstar Data Centre Management (Cambodia) which are developing hyperscale data center facilities that will be operational in 2021 and 2022.
2. Singapore is an established data center market within Southeast Asia, followed by Indonesia, Malaysia, and Thailand. Vietnam, Cambodia, Myanmar, and the Philippines are emerging data center markets.
3. The availability of land to develop greenfield data centers is very low in Singapore, leading to more brownfield construction, and data centers shifting to other countries such as Malaysia, Indonesia, and Thailand.
4. According to the Uptime Institute, there are around 99 Tier certified data center facilities in the Southeast Asia, of which there more than 85 are Tier III and nine are Tier IV certified facilities.
5. Most data centers in Southeast Asia adopt DRUPS systems to overcome power outages, and the demand is quite high in the market which will add significant revenue growth to DRUPS vendors operating in this region.
6. Government entities are strengthening their internet infrastructure in the region with around 10 active submarine connectivity projects underway in Southeast Asia currently.

Key Offerings:
• Market Size & Forecast by Revenue | 2020−2026
• Market Dynamics – Leading trends, growth drivers, restraints, and investment opportunities

• Market Segmentation – A detailed analysis by IT Infrastructure, electrical infrastructure, mechanical infrastructure, cooling technique, cooling systems, general construction, tier standards, and geography
• Competitive Landscape – 12 IT infrastructure providers, 17 support infrastructure providers, 15 data center contractors, and 16 data center investors

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Southeast Asia Data Center Market – Segmentation

• The server market expects to witness significant growth in the next few years due to increased investments from large cloud service providers in the region. The adoption of converged and hyper-converged infrastructure solutions is projected to increase the demand for servers with multicore processors.
• The data center generator market is likely to grow due to the construction of large and mega facilities across the Southeast Asia region. The adoption of efficient power systems such as gas generators is growing. The implementation of the carbon tax in countries such as Singapore has driven operators to opt for efficient generators.
• Most data centers in Singapore design to cool infrastructure through water-based cooling techniques. The use of air-based cooling is low in Singapore than in other Southeast Asian countries. Data centers are designed for hot/cold aisle containment systems and are equipped with 42U and 45U racks.

Southeast Asia Data Center Market by IT Infrastructure
• Servers
• Storage
• Network
Southeast Asia Data Center Market by Electrical Infrastructure
• UPS Systems
• Generators
• Transfer Switches and Switchgears
• PDUs
• Other Electrical Infrastructures
Southeast Asia Data Center Market by Mechanical Infrastructure
• Cooling Systems
• CRAC & CRAH Units
• Chiller Units
• Cooling Towers, Dry Coolers, & Condensers
• Other Cooling Units
• Racks
• Others Mechanical Infrastructure
Southeast Asia Data Center Market by Cooling Technique
• Air-based Cooling Technique

- Liquid-based Cooling Technique

Southeast Asia Data Center Market by General Construction
- Core and Shell Development
- Installation and Commissioning Services
- Engineering and Building Designs
- Physical Security
- DCIM/BMS

Southeast Asia Data Center Market by Tier Standards
- Tier I & II
- Tier III
- Tier IV

Southeast Asia Data Center Market – Dynamics

In April 2020, Keppel DC partnered with Toll Group for the development of a floating data center in Singapore based on modular data center designs that can be scaled based on demand. Keppel DC is likely to consider deploying the floating data center solution of Nautilus Data Technologies. In October 2020, Keppel DC signed an MOU with City Gas and City-OG Gas Energy Services 2020 to develop the hydrogen floating data center project. Data center operators install fuel cells to reduce carbon dioxide emissions and improve operating efficiency. Fuel cells are expected to be feasible choices in cities with high electricity prices and regular power fluctuations in grid supply. Most data center operators pursue the concept of fuel cells with hydrogen-powered fuel cells that provide advantages in terms of price and reliability. The price of fuel cells is around $0.12 per kWh, which is highly beneficial for data center operators, operating facilities in cities with electricity pricing of above $0.10 per kWh. For instance, the power cost in Singapore is over $0.12 per kWh, where fuel cells can be installed to reduce the OPEX.

Key Drivers and Trends fueling Market Growth:
- Increasing Adoption of Renewable Energy
- Rise in Adoption of the All-Flash & Hybrid Array
- Increase in Data Center Investments
- Increase in Cloud Adoption Driving the Data Center Market

Southeast Asia Data Center Market – Geography

Singapore is the major data center hub in Southeast Asia, with the presence of data center facilities operated by internet, cloud, telecommunication, and colocation service providers. Sub-sea fiber network connectivity to the country routes over 90% of the world's Internet traffic. The country's GDP is likely to be aided by the digital economy by around 0.5% on a YoY basis, with an estimated contribution of around $8 billion by 2020. According to the Singapore Internet Exchange (SGIX), the average inbound traffic increased to around 350 Gbps in May 2020 from

200 Gbps in May 2019. It is expected to grow exponentially with an increase in data center traffic between 2020 and 2026. In December 2020, Ericsson and Singtel deployed 5G network connectivity services in Singapore. In February 2021, Singapore telecom regulator IMDA is investing around $22 million to accelerate the adoption of 5G services in the country. Singapore-based telecom operator M1 has launched a stand-alone 5G network in parts of Singapore.

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Southeast Asia Data Center Market by Geography
•Southeast Asia
oSingapore
oMalaysia
oThailand
oIndonesia
oVietnam
oPhilippines
oCambodia & Myanmar

Key Data Center Critical (IT) Infrastructure Providers
•Arista Networks
•Broadcom
•Cisco Systems
•Dell Technologies
•Fujitsu
•Hewlett Packard Enterprise (HPE)
•Huawei Technologies
•IBM
•Inspur
•Lenovo
•NetApp
•Oracle

Key Data Center Support Infrastructure Providers
•ABB
•Bosch Security Systems (Robert Bosch)
•Caterpillar
•Cummins
•Cyber Power Systems
•Delta Electronics
•Eaton
•Fuji Electric
•HITEC Power Protection

- KOHLER-SDMO
- Legrand
- Mitsubishi Electric Corporation
- Piller Power Systems
- Rittal
- Rolls-Royce Power Systems
- Schneider Electric
- Vertiv Group

Key Data Center Contractors
- Arup Group
- AWP Architects
- Aurecon Group
- CSF Group
- Cundall
- DSCO Group
- Fortis Construction
- Faithful+Gould
- Kienta Engineering Construction
- ISK Engineering
- M+W Group (Exyte)
- NTT FACILITIES Group
- Nakano Corporation
- PM Group
- Sato Kogyo

Key Data Center Investors
- AIMS Data Centre
- AirTrunk Operating
- Bridge Data Centres
- BDx (Big Data Exchange)
- Digital Realty
- DCI Indonesia
- DTP
- Equinix
- Iron Mountain
- Keppel Data Centres
- Kepstar Data Centre Management
- NTT Global Data Centers
- Regal Orion
- Space DC
- ST Telemedia Global Data Centres
- VADS Berhad

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