

Datacentre pricing forecasts 73% growth in worldwide Data Centre raised floor space over four years

Submitted by: Tariff Consultancy Ltd

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Datacentre pricing specialists in Data Centre research, has launched a new report called "The Global Data Centre Trends which examine the top 10 trends in 3rd party DC markets worldwide including - space, power, facility design & technology" worldwide.

Datacentre pricing has identified the top trends as:

1. The build out of new Hyperscale Data Centres worldwide – into new markets
Data Centre Providers are now spreading their Hyperscale Data Centre facilities around the world – away from the traditional Data Centre Metro clusters – or the so-called Tier I markets typically with 200 MW or more of Data Centre Power available.

2. The importance of Cloud services in driving Data Centre demand worldwide
Datacentre pricing has identified Hyperscale Data Centres that are under construction worldwide coming to a total of 921,458 m2 Data centre space and just under 2,000 MW of power.

3. The raising of new finance for Private Equity investment in Data Centres
Heavy capital investment is required: New Hyperscale Data Centre facilities require investment of USD \$200 million or more per facility – for campus Data Centre sites some of the investments can be considerably higher at around USD \$1 billion.

4. The acceleration of A&M (Acquisition & Mergers) in the Data Centre segment
There has been a significant increase in A&M activity in the Data Centre segment, with the most recent ones up to the end of July 2022 - of those that have disclosed – providing a figure of just under USD \$50 billion.

5. There is uncertainty about future Data Centre pricing and revenue trends
The increase in power per new Data Centre facility is also ensuring that power availability is becoming a key pre-requisite in selecting a potential Data Centre location. In some highly populated cities, there is both a shortage of available space and power for new Data Centre facilities with Data Centre Providers now being restricted to building in. For example, in Norway, Data Centres with over 0.5 MW of power will have to consider connecting to a municipal heat recovery network to distribute heat from the facility

6. The energy usage of Data Centres and a potential energy shortage
Datacentre pricing believes that the impact of new proposed Data Centres on the local power grid will become a key factor in planning approvals to be granted for new Data Centre facilities. If there is a potential power constraint than the Data Centre Provider will need to mitigate the amount power being used or supply additional power itself.

7. The introduction of Data Centres in new developing markets
Datacentre pricing shows the amount of third-party Data Centre raised floor space with the total

population for selected country markets, with the top five as shown in the table below:

Country	Population	DC Space (in m2)	People per 1 m2 of DC Space
Singapore	6,000,000	445,000	13
Hong Kong	8,000,000	330,000	24
USA	330,000,000	12,900,000	26
NL	18,000,000	538,000	33
UK	68,000,000	980,000	69

8. The growth of Data Centre Metro markets & Data Centre City Clusters worldwide

Datacentrepricing for example has identified seventeen Metro Data Centre clusters in the Asia Pacific region with 50 MW of power or above.

9. The future changes in Data Centre Technology will allow more sustainable Data Centre facilities

As one of the new trend identified by Datacentrepricing is the development of green financing initiatives, which is being used by a number of Data Centre Providers as a means of modernising their Data Centres.

10. Projecting the global Data Centre market in 2030 – the key forecast changes

By 2030, Datacentrepricing forecasts that the global Data Centre market will see a number of changes and believes content hubs with connectivity to subsea cable systems are becoming a feature of new Data Centre markets.

Datacentrepricing forecasts that Data Centre raised floor space will grow by 73 per cent worldwide over the four-year period to the end of 2026, by region the forecast growth rates are:

EMEA region – by 124%

Asia region – by 60%

Americas region – by 47%

from a total base of 26,900 million m2 of Data Centre space.

Datacentrepricing forecasts that Data Centre Customer Power will grow by 69% worldwide over the four-year period to the end of 2026.

Note to the Editors:

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About Datacentrepricing's Global Trend Data Centre report' – The Global Trend Data Centre report 2022

to 2026 provides a unique survey of the third-party Data Centre market worldwide segmented into three regions comprising the EMEA, Americas and the Asia-Pacific. The report is segmented into three parts, with Part I examining the top ten key global trends in the Data Centre market from 2022 to the end of 2026, with Part II providing Data Centre space, power, key providers & new developments in the three surveyed regions with Part III providing a forecast for each region.

The Datacentrepricing Global Trend Data Centre report is available for GBP 2,495.00 for a single user licence. Further information will be available on the DCP website at: www.datacentrepricing.com.

About Data Centre Pricing (DCP) – Datacentrepricing is a subsidiary of Tariff Consultancy Ltd, a London-based telecoms research and consultancy company which provides daily news and analysis commentary and subscription services via its Telecoms Pricing website. Datacentrepricing provides analysis and research worldwide on the Data Centre industry with reports published on Data Centre markets in Europe, the Middle East, Africa with subscription services. Further information on Datacentrepricing's services is available on www.datacentrepricing.com.