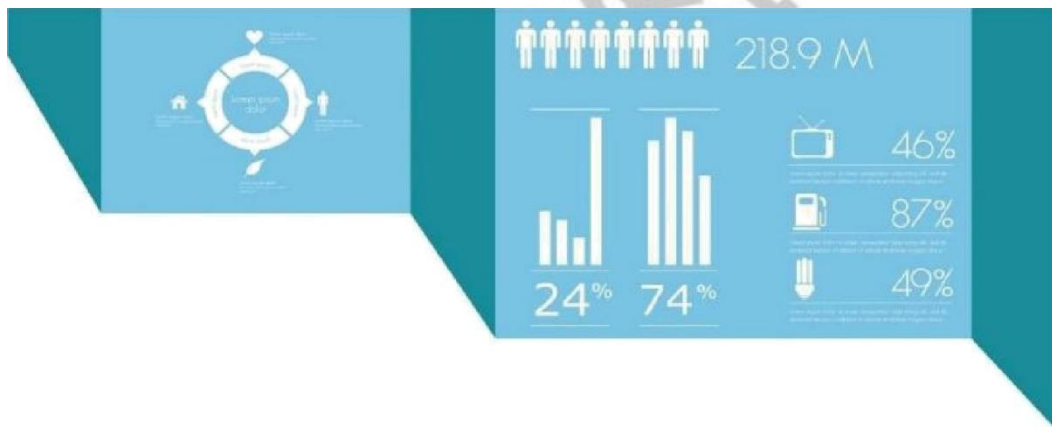




2020-2021

IDC Market Research Report for Beijing and Surrounding Areas (Sample Version)



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KZ Consulting (China IDCquan)
Zhongke Zhidao (Beijing) Technology Co., Ltd.
April 2021

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Main Conclusion

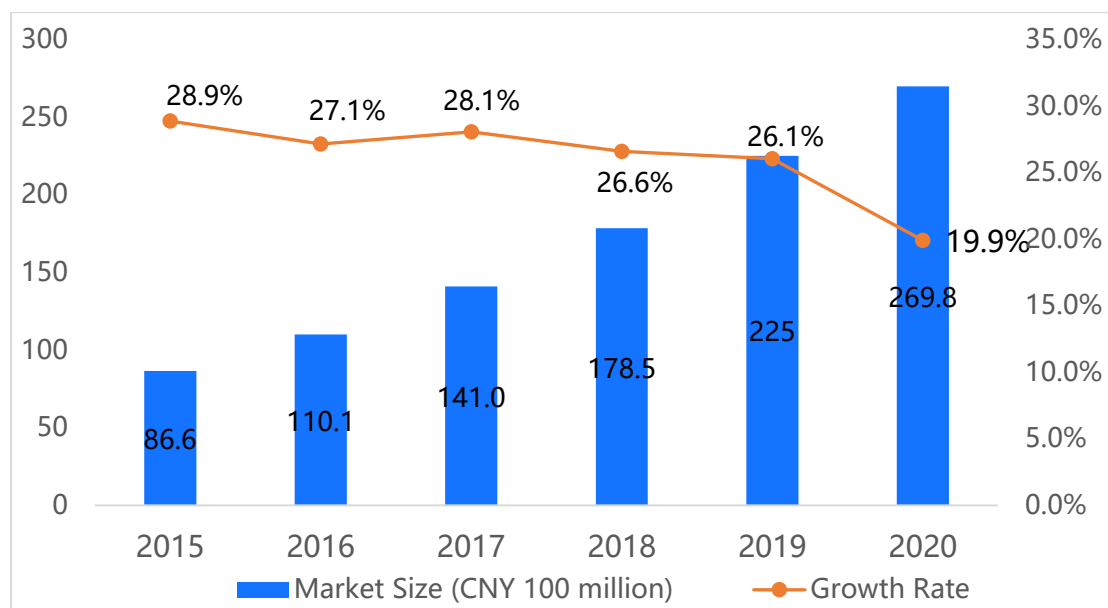
In 2020, the scale of IDC market in Beijing and surrounding areas will continue to maintain rapid growth. With the impact of Beijing's energy consumption policy, the number of new cabinets in Beijing will slow down in the future, and the Beijing Surrounding areas will become the main area for new resources.

1、 In 2020, the IDC market in Beijing will reach CNY 26.98 billion, accounting for 27.1% of the national IDC market, ranking first among major cities in China.

In 2020, the IDC market in Beijing will reach 26.98 billion yuan, a year-on-year increase of 19.9%, continuing to maintain rapid growth. With the decline in the number of new racks in Beijing, the growth rate of the market scale of the IDC industry racks business in Beijing has slowed down, and the contribution of the network transfer business to the overall market scale will increase in the future.

In 2020, Beijing is the country's largest IDC regional market, with a market size accounting for 27.1% of the national IDC market. It is estimated that by 2023, the IDC market in Beijing will expand rapidly. In the next three years, it will maintain a growth rate of over 15%. The demand will mainly come from large Internet companies, cloud service providers and financial companies.

Figure 12 2015-2020 Beijing IDC Market Size



Source: KZ Consulting (China IDCquan), 2021.04

2. In 2020, the market share of third-party IDC service providers in Beijing will exceed 50%, and the top third-party IDC service providers will account for a relatively large proportion.

In 2020, the market share of third-party IDC service providers in Beijing has exceeded 50%, which is higher than that of Foundation telecom operators (China Telecom, China Mobile, China Unicom. Large-scale third-party IDC service providers have continued to increase their investment in self-built computer rooms in recent years. As of 2020, the proportion of self-built cabinets by third-party IDC service providers will exceed 70%, which is much higher than that of basic telecom operators.

Among the third-party IDC service providers, the market share of TOP10 service providers accounted for 64.7% of the whole third-party IDC service providers. 21Vianet and GDS accounted for 18% and 15% respectively, and they have a leading advantage. Third-party service providers with higher market shares include Sinnet, Dr. Peng, etc.

3. The data center industry in the Beijing-Tianjin-Hebei region is coordinated to promote the deployment of data centers in the region around Beijing.

Due to policy reasons, especially the impact of Beijing data center policy, in the next three years, more than 80% of the new rack resources in the Beijing will be concentrated in the suburbs outside the central city of Beijing, Langfang City, Zhangjiakou City and Wuqing District around Beijing in the next 3 years.

With the proposal of “carbon peak and carbon neutrality”, the data center industry, as an energy-intensive industry, has greatly increased the demand for green power resources. Zhangjiakou, a region around Beijing, is a national-level green energy base with rich green power resources. In the future, it will be a key area for the development of the data center industry.

4. Leading Internet companies start to deploy in the Beijing Surrounding Areas.

With the rapid growth of Internet companies and the expansion of revenue, many Internet companies have migrated their public cloud services to the data centers of third-party IDC service providers, increasing the demand for IDC services. In 2020, the racks demand of Internet companies in Beijing and surrounding areas will exceed 30,000, and it will continue increasing with a 30% growth rate in the future.

With the growth of the public cloud market, cloud service providers continue to expand their cloud computing resource pools. The demand for data centers has greatly increased. Cloud service providers represented by Alibaba Cloud, Tencent Cloud, and Huawei Cloud demand more than 10,000 racks in the Beijing.

5. In 2020, the total racks resources of Beijing data center will reach 300,000, and the racks resources of Beijing surrounding areas will be approximately 95,000. It is estimated that by 2023, the total supply of rack resources in Beijing and surrounding areas will reach CNY 565,000.

At the end of 2020, the total supply of IDC racks in Beijing and surrounding areas reached 395,000 (300,000 in Beijing and 95,000 in surrounding areas). It is expected that from 2021 to 2023, the IDC racks resources supply of Beijing and Surrounding Areas will maintain a growth rate of 15%, and the total number will reach 565,000 in 2023. The growth of racks supply will mainly come from Beijing Surrounding Areas. The expansion of top and promising Internet companies' business brings an increase of data. The user application technologies like 5G and IoT brings large amount data processing demand, and it will be a main driver to the data center increasing in Beijing and Surrounding Areas.

6. It is estimated that by 2023, the IDC industry market in Beijing will reach CNY 41.86 billion.

The IDC market in Beijing will continue to grow steadily in the next few years. It is estimated that by 2023, the market will reach CNY 41.86 billion. In the next three years, Beijing will slow down the speed of adding new rack resources, the demand for racks from top Internet will accelerate, and the supply of new racks in the Beijing Surrounding Areas will exceed that of Beijing. In Beijing IDC business, the supply and demand of network transport services will be significantly increased.

Companies Mentioned

21 Vianet 世纪互联

GDS 万国数据

Sinnet 光环新网

Dr Peng 鹏博士

Hui Tian Net 汇天网络

CEICLOUD 中经云

ChinaCache 蓝汛

CloudVSP 天地祥云

Daily Tech 德利迅达

NETNIC 企商在线

Yuntai Hulian (transliterated from 云泰互联)

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